



Wychwood School

## **Data Requesting, Storage, Retention and Disposal Policy**

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**Inception: March 2018**

**Review: February 2019**

**Date of Next Review: February 2021**

### **Aims**

The aim of this policy is to provide guidelines for parents and pupils as to the types of data the school will request from parents and the frequency with which the School will check that the data it holds is correct. It is also to provide guidelines for the information of parents, staff, pupils and former pupils as to the length of time Wychwood, Oxford will retain various types of data.

### **Principles**

Wychwood, Oxford will manage its data in the spirit of Privacy by Design which is "an approach to projects that promotes privacy and data protection compliance from the start." This will take human values into account throughout the entire systems design process, aiming to build inherently secure systems and processes, rather than bolting protection on retroactively.

Most, but not all of the information held by Wychwood, Oxford will be straightforward to deal with as personal data, as described by the Information Commissioner's Office (ICO) in the following terms:

*Personal data means data which relate to a living individual who can be identified –*

*(a) from those data, or*

*(b) from those data and other information which is in the possession of, or is likely to come into the possession of, the data controller,*

*and includes any expression of opinion about the individual and any indication of the intentions of the data controller or any other person in respect of the individual.*

However, there will be instances where sensitive personal data concerning health, medical conditions, family circumstances or some other factor has to be processed. The ICO describes sensitive personal data in the following terms:

*Sensitive personal data means personal data consisting of information as to -*

*(a) the racial or ethnic origin of the data subject,*

*(b) his political opinions,*

*(c) his religious beliefs or other beliefs of a similar nature,*

*(d) whether he is a member of a trade union (within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992),*

*(e) his physical or mental health or condition,*

*(f) his sexual life,*

*(g) the commission or alleged commission by him of any offence, or*

*(h) any proceedings for any offence committed or alleged to have been committed by him, the disposal of such proceedings or the sentence of any court in such proceedings.*

The presumption is that, because information about these matters could be used in a discriminatory way, and is likely to be of a private nature, it needs to be treated with greater care than other personal data.

The School is registered as a Data controller with the ICO with the registration reference Z8502278. Both categories of personal data can be processed as the School has a contract in place between it and parents and therefore has a “**legitimate interest**” to process data.

The School processes sensitive personal data because when the School requests such data and the parents inform the School accordingly, the parents are deemed to have given “**explicit consent**” to the processing and appropriate use of that data according to Article 9 of the European Union General Data Protection Regulation (GDPR) which comes into law in the United Kingdom as the Data Protection Act 2018 on May 2018.

Wychwood, Oxford has fewer than 250 employees, so the ICO only requires the School to document processing activities that:

- are not occasional; or
- could result in a risk to the rights and freedoms of individuals; or
- involve the processing of special categories of data or criminal conviction and offence data.

It will also be necessary to get separate consents for particular activities that the pupil and school undertakes. These will include, but will not be limited to:

- Taking, using, storage and disposal of images
- School trips and events
- Minibus use.

The Data Protection Acts of 1998 and 2018 state that personal data must not be kept for any longer than is reasonably necessary for its particular purpose. We also aim to abide by the limitation periods set out in law for various categories of document.

Employees of Wychwood, Oxford may not under any circumstances dispose of a document about which they are uncertain without the express permission of the Head or the Chair of Governors.

## REQUESTING AND CHECKING DATA

Data	Initial collection	Seen by (going forward)	Frequency of Update / Confirmation Information is Correct	Sent by	When checked
Name, DoB, sex	Parents to M&A on enquiry or registration	M&A, school office, finance office, teaching staff, boarding	Twice	M&A	Registration form and Acceptance form

<b>Data</b>	<b>Initial collection</b>	<b>Seen by (going forward)</b>	<b>Frequency of Update / Confirmation Information is Correct</b>	<b>Sent by</b>	<b>When checked</b>
		staff (SENDCo)			
Contact details: addresses, e-mail addresses, phone contacts	Parents/guardians to M&A (Registration and Acceptance form)	M&A, school office, finance office, teaching staff, (SENDCo)	Annually	School Office	1 <sup>st</sup> exeat Mich
Emergency Contact details (will probably include family members' personal data)	Parents to M&A (Acceptance Form)	M&A, school office, finance office, teaching staff, (SENDCo)	Annually	School Office	1 <sup>st</sup> Exeat Mich
SEND Needs	Parents to M&A enquiry, registration or Acceptance form	M&A, school office, finance office, teaching staff, SENDCo	Annually	SENDCo	1 <sup>st</sup> Exeat Mich
Medical Conditions and Permissions	Parents to M&A prior to taster/ entrance exam days or New Pupils' pack	M&A, school office, finance office, teaching staff, SENDCo, school nurse, catering	Annually	School Office / Junior Housemistress	1 <sup>st</sup> Exeat Mich
Allergy information	Parents to M&A prior to taster/ entrance exam days or New Pupils' pack	M&A, school office, finance office, teaching staff, SENDCo, school nurse, catering	Annually	School Office / Junior Housemistress	1 <sup>st</sup> Exeat Mich

<b>Data</b>	<b>Initial collection</b>	<b>Seen by (going forward)</b>	<b>Frequency of Update / Confirmation Information is Correct</b>	<b>Sent by</b>	<b>When checked</b>
Parental contact details for Parents' Directory	Parents to M&A (New Pupils' pack)	M&A, school office, other parents	Termly	M&A	End of each term
Parental contact details for FoW	Parents' Directory	School Office, FoW committee	Termly as part of the Parents' Directory check	M&A	End of each term
Taking, storing and processing of Images of children	M&A to parents (New pupils' pack)	M&A, school office, teaching staff, SENDCo,	Annually	School Office	1st exeat Mich
Annual consent form for school trips to include use of minibus permission and permission to be driven by staff	M&A to parents (New Pupils' pack)	M&A, school office, teaching staff, SENDCo,	Annually	School Office	1st exeat Mich
Annual Consent form for Sex Education	M&A to parents (New Pupils' pack)	M&A, school office, biology teacher, PHSEE teacher	Annually	School Office	1st exeat Mich
Reports and Progress sheets	School to parents	Teaching staff, school office, school records officer	At least termly	Finance Assistant and Bursar	As required

### **Storing of Personal Data**

Prior to entry to Wychwood paper hard copy data, including both personal and sensitive personal data is stored in pupil's Prospective Files in the Marketing and Admissions Office. Electronic data is stored in the Marketing and Admissions Office and on the Admissions Area of the Management Information System (MIS) PASS.

The Marketing and Admissions Office is always locked when empty. The MIS is password protected and access to the Admissions area of the database is limited to the M&A Director and his assistant, the finance assistant, the Bursar and the Head.

### **Retention and Disposal of Personal Data**

This is according to the Data Requesting, Storage, Retention and Disposal Policy which is available on the school website.

Wychwood, Oxford will retain and dispose of records and documents according to the relevant legal considerations in respect of retention. These include:

- statutory duties and government guidance relating to schools, including for safeguarding
- disclosure requirements for potential future litigation
- contractual obligations
- the law of confidentiality and privacy
- the Data Protection Act 2018

In principle Wychwood, Oxford

- will keep personal or sensitive personal data securely on-site in the archive protected by a key pad or on a password-protected electronic system where the password is regularly changed
- will check that cloud-based digital records are encrypted
- will ensure that digital documents' metadata is preserved as far as is possible
- will not discard or delete any material that may be relevant to child protection or safeguarding
- will not retain personal or sensitive personal data longer than is necessary for its purpose
- will not retain a greater volume of personal or sensitive personal data than is necessary for its purpose
- will ensure that sensitive personal data of employees or pupils, including allegations of a sexual or criminal nature (whether proven or not), or details as to physical or mental health, are kept securely and shared or accessible only on a need-to-know basis – for example, where a competent authority reasonably requests such information, citing lawful grounds.
- will pass on individual pupil's Child Protection files to new schools when a pupil transfers and a copy will not be kept, unless an incident took place while the pupil was at Wychwood. Then a copy will be kept indefinitely.

## Appendix A

**This appendix replaces the Retention of Documents policy.**

These time limits will be re-assessed every six years, starting in 2024

**Safeguarding**

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
Incident reporting	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 by a suitably qualified person.	Paper and electronic	Bursar's office and Bursar's PC	SECURE DISPOSAL
DBS disclosure certificates	<u>No longer than 6 months</u> from decision on recruitment, unless DBS specifically consulted. However, a record of the checks must be kept but not the certificate itself.	Paper	Staff file	SECURE DISPOSAL (by the designated member of staff)
Safeguarding Information	For the lifetime of that child unless transferred to another school in the Child Protection File	Paper and Electronic	CP files – Head's office	SECURE DISPOSAL (by the designated member of staff)
Safeguarding Policies	Permanent – all historic versions of Safeguarding and Child Protection policy – records start 2011	Electronic	Staff Shared – Policies	Retained permanently

## Governors

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Instruments of Government - Memorandum of Association of Wychwood School (Oxford) Ltd and Articles and changes to them	Permanently. Retain in school while school is open	Paper	In school Head's office	SECURE DISPOSAL
Trusts and Endowments	Permanently	Paper	In school Bursar's office	SECURE DISPOSAL
Board Minutes – signed	Date of meeting + 6 years	Paper and Electronic	In school. Paper - Bursar's office.	SECURE DISPOSAL
Record of former Board members	Permanently	Paper and electronic	Archive	SECURE DISPOSAL
Board Minutes – governor and staff copies	Date of meeting + 3 years	Paper	With staff or governors	SECURE DISPOSAL
Board Agendae	Date of Meeting	Paper and Electronic	Bursar	SECURE DISPOSAL
Reports to Board	Date of report + 6 years	Paper and Electronic	Bursar	SECURE DISPOSAL
Action Plans	Date of action plan + 3 years	Paper and electronic	Bursar	SECURE DISPOSAL
Policy documents	Expiry of policy. Retain in School whilst policy is operational (this includes if the expired policy is part of a past decision making process).	Paper and electronic	In school, website, school intranet	Expiry of policy. Retain in School whilst policy is operational (this includes if the expired policy is part of a past decision making process).
Complaints Records	Date of Resolution of Complaint + 6 years	Paper and electronic	In school Head's office and Head's PC	Retain in School for the first six years. Review for further retention in the case of contentions disputes. SECURE DISPOSAL for

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
				routine complaints.
Department for Education Annual School Census	Date of report + 10 years	Paper and Electronic	In school. Bursar's office	In public domain so no need for secure disposal.
Finance Committee Minutes	Date of meeting + 6 years	Paper and electronic	Paper - Bursar's office	SECURE DISPOSAL
Education Committee Minutes	Date of meeting + 6 years	Paper and electronic	Paper – Head's Office	SECURE DISPOSAL



## MANAGEMENT

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
SMT Minutes	Retain in school for 5 years from date of Meeting	Paper and electronic	With SMT, school office	SECURE DISPOSAL
Records created by head teacher, deputy heads, heads of year and other members of staff with admin. Responsibilities.	Closure of file + 6 years	Paper and electronic	In school. With individual staff	SECURE DISPOSAL
Correspondence created by head teacher, deputy heads, heads of year and other members of staff with administrative responsibilities	Closure of file + 6 years	Paper and electronic	In school. With individual staff	SECURE DISPOSAL
School development plans	Closure + 6 years	Paper and Electronic	In school Head's office	Retain in School for the first six years. Review for further retention in the case of contentions disputes. SECURE DISPOSAL for routine complaints.
Staff Meeting Minutes	10 years for paper	Paper and electronic	Head's office and	SECURE DISPOSAL

## PUPILS

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Admissions: application forms, assessments, records of decisions	25 years from date of birth (or, if pupil not admitted, normally 1 year after their proposed initial entrance point but permission sought to delete).	Paper and Electronic	M&A Office and M&A PCs	SECURE DISPOSAL
Attendance registers	6 years from last date of entry, then archive.			
Admissions Registers	Permanent	Paper and Electronic	M&A Office and M&A PCs and memory stick in safe	Retain
Pupil files including pupil reports, performance records & medical records	DOB of the pupil + 25 years (subject, where relevant, to safeguarding considerations). Any material which may be relevant to potential claims should be kept for the lifetime of the pupil.	Paper	In school – archive	SECURE DISPOSAL
Special Education Needs files, reviews and Individual Education Plans	DOB of the pupil + 35 years. NOTE: This retention period is the minimum period that any pupil file should be kept. Some local authorities choose to keep SEN files for a longer period of time to defend themselves in a “failure to provide a sufficient education” case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period.	Paper	In school -archive	SECURE DISPOSAL
Correspondence Relating to Authorised Absence and Issues	Date of absence + 2 years	Paper and electronic	In school – office and archive	SECURE DISPOSAL
Public examination results	Year of examinations + 6 years	Paper and electronic	In school – office and archive	SECURE DISPOSAL
Internal examination results	Current year + 6 years	Paper and electronic	In school with staff and archive	SECURE DISPOSAL
Any other records created in the	Current year + 3 years	Paper and electronic	In school with staff	Review at the end of 3 years and either allocate a

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
course of contact with pupils			and archive	further retention period or SECURE DISPOSAL
Statement maintained under The Education Act 1966 – Section 324: statemented pupils or pupils with an EHCP	DOB + 30 years	Paper and electronic	In school SENDCo files	SECURE DISPOSAL unless legal action is pending
Proposed statement or amended statement	DOB + 30 years	Paper and electronic	In school SENDCo files	SECURE DISPOSAL unless legal action is pending
Advice and information to parents regarding educational needs	Closure + 12 years	Paper and electronic	In school SENDCo files	SECURE DISPOSAL unless legal action is pending
Accessibility Strategy	Closure + 12 years	Paper and electronic	In school SENDCo files	SECURE DISPOSAL unless legal action is pending
Parental permission slips for school trips – where there has been no major incident	Conclusion of the trip	Paper and electronic	In school with staff <a href="#">Website?</a>	SECURE DISPOSAL
Parental permission slips for school trips – where there has been a major incident	DOB of the pupil involved in the incident + 25 years The permission slips for all pupils on the trip need to be retained to show that the rules had been followed for all pupils	Paper and electronic	In school with staff	SECURE DISPOSAL
Girls' GCSE and A-level Examination Certificates – Uncollected	DoB + 50 years	Paper	School Office	SECURE DISPOSAL
Girls' GCSE and A-level Examination records	DoB + 50 years	Paper	Archive	SECURE DISPOSAL
Girls' Extra-Curricular Certificates below Grades VI, VII and VIII	2 years	Paper	Archive	SECURE DISPOSAL

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
Girls Extra-Curricular Certificates at or above Grades VI, VII and VIII	DoB + 25 years	Paper	Archive	SECURE DISPOSAL
Girls' School Health Records	Until girls reach 25 years of age	Electronic (PASS)	School office and Archive	

## Curriculum

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
School Development Plan	Current year + 6 years	Paper and electronic	In school Intranet and with head	SECURE DISPOSAL
DoS Development Plan	Current year + 6 years	Paper and electronic	In school with DoS	SECURE DISPOSAL
School Ongoing Priorities	Current year + 6 years	Paper and electronic	In school Intranet and with head	SECURE DISPOSAL
Annual Curriculum	Current year + 3 years	Paper and electronic	In school	SECURE DISPOSAL
Schemes of work	Current year + 1 year	Paper and electronic	In school	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
Timetable	Current year + 1 year	Paper and electronic	In school	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
Mark Books	Current year + 1 year	Paper and electronic	In school	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
Teachers' Planners and Record Books	Current year + 1 year	Paper and electronic	In school	It may be appropriate to review these records at the end of each year and allocate a

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
				new retention period or SECURE DISPOSAL
Pupils' work	Current year + 1 year	Paper and electronic	In school	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
Examination Results	Current year + 6 years	Paper and Electronic	In school	SECURE DISPOSAL
Value Added & Contextual Data	Current year + 6 years	Paper and Electronic	In school	SECURE DISPOSAL

## PERSONAL RECORDS HELD IN SCHOOL

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Single Central Register of Employees	Permanent record of all mandatory checks undertaken on current staff. Staff can be removed once they leave It I Wychwood's policy to retain staff SCR details for 1 year after they leave on the Leavers' page of the SCR spreadsheet	Electronic	In DSL's PC	Do not dispose
Proofs of identity collected as part of the process of checking enhanced and 'portable' enhanced DBS disclosure via the Updates service	Duration of employment + minimum 7 years. Copy documentation should be placed on the member of staff's personnel file.	Paper and Electronic	In school office	SECURE DISPOSAL
Contracts of employment	7 years from the effective date of the end of contract.	Paper and Electronic	In school archive	SECURE DISPOSAL
Application forms / recruitment information from staff NOT interviewed	Interview date + minimum 3 month unless consent given to retain on application form. Not more than 1 year	Paper and Electronic	In school office	SECURE DISPOSAL
Application forms / recruitment information from staff interviewed but not appointed	Interview date + 1 month unless consent given to retain on application form	Paper and Electronic	In school office	SECURE DISPOSAL
Application forms / recruitment information from prospective staff	3 years from date on application form	Paper and Electronic	In school office	SECURE DISPOSAL
Staff Personnel files	Duration of employment plus minimum 7 years but <u>do not delete any information which may be relevant to historic safeguarding claims.</u>	Paper and Electronic	In school office and archive	SECURE DISPOSAL
Interview notes and recruitment records	Date of interview + 6 months	Paper and Electronic	In school office	SECURE DISPOSAL
Immigration records	Minimum – 4 years	Paper and electronic	In school office	SECURE DISPOSAL
Pre-employment vetting information (including DBS checks)	Date of check + 6 months	Paper and electronic	In school office	SECURE DISPOSAL

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
Disciplinary proceedings - written warning	Date of warning + 12 months	Paper and electronic	In school office on personnel file	SECURE DISPOSAL
Disciplinary proceedings - final warning	Date of warning + 12 months	Paper and electronic	In school office on personnel file	SECURE DISPOSAL
Disciplinary proceedings – case not found	If child protection related records to be kept indefinitely otherwise SECURE DISPOSAL immediately at the conclusion of the case	Date of warning + 12 months Paper and electronic	In CP filing cabinet Head's office	SECURE DISPOSAL
Records relating to accident/injury at work	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	Paper and electronic	Bursar's office	SECURE DISPOSAL
Staff Appraisal Statements and Appraisal Reviews	For the duration of employment and for minimum 7 years thereafter	Paper and electronic	On personnel files	SECURE DISPOSAL
Timesheets, sick pay	Current year + 6 years	Paper and electronic	In Bursar's office	SECURE DISPOSAL
Payroll, salary, maternity/paternity pay records	Minimum – 6 years	Paper and electronic	In Bursar's office	SECURE DISPOSAL
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1996.	Current year + 6 years	Paper and electronic	In Bursar's office	SECURE DISPOSAL
Health records relating to staff	End of contract + 7 years	Paper and electronic	In Bursar's office	SECURE DISPOSAL
Data protection records documenting processing activity, data breaches	No limit: as long as up-to-date and relevant (as long as no personal data held). Review on a case by case basis	Paper and electronic	In Bursar's office	SECURE DISPOSAL



## HEALTH AND SAFETY

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Accessibility Plan	Current Year + 6 years	Paper and electronic	Staff intranet, website	SECURE DISPOSAL
Policy Statements	Date of expiry + 1 year	Paper and electronic	Staff intranet, Website, School Office ***	SECURE DISPOSAL
Risk Assessments	Current year + 3 years unless an accident or incident occurred: then permanently.	Paper and electronic	Staff intranet, Website	SECURE DISPOSAL
Accident Reporting - Adult	Date of Incident + 7 years. Review on a case-by-case basis	Paper	Bursar's office	SECURE DISPOSAL
Accident Reporting – Child	Date of Incident + 25 years (longer if safeguarding). Review on a case-by-case basis	Paper	Bursar's Office	SECURE DISPOSAL
Accident Books	Current year + 20 years – then review on a case-by-case basis. Can any living person make a claim?	Paper	Bursar's Office	SECURE DISPOSAL
COSHH	Current year + 10 years (where appropriate an additional retention period may be allocated). Review on a case-by-case basis	Paper	Bursar's Office	SECURE DISPOSAL
Records of Reportable Injuries	Permanently	Paper	Bursar's office	
Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	Last action + 40 years	Paper and Electronic	Bursar's Office	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have come in contact with radiation	Last action + 50 years	Paper and Electronic	Bursar's Office	SECURE DISPOSAL
Fire Precautions log books	Current year + 6 years. 10 years from date of last entry	Paper and Electronic	Bursar's Office	SECURE DISPOSAL
Maintenance logs	10 years from date of last entry	Paper and Electronic	Bursar's Office	SECURE DISPOSAL
Marsh Insurance	Permanently	Paper	Bursar's Office	SECURE DISPOSAL

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
Correspondence relating to insurance claims/renewals/notification	Minimum 7 years	Paper and Electronic	Bursar's Office	SECURE DISPOSAL

## **ARCHIVE**

**This is in progress – we are waiting for information from the ICO in response to a query.**

## ADMINISTRATION

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Employer's Liability certificate	Closure of the School + 40 years	Paper		SECURE DISPOSAL
Inventories of equipment & furniture	Current year + 6 years	Paper and Electronic	School office, bursar's office and departments	SECURE DISPOSAL
School brochures or prospectus	Current year + 3 years	Paper and Electronic	M&A Office, school office	SECURE DISPOSAL
Circulars / Letters (staff/parents/pupils) sent out on Wychwood Weekly	Current year + 1 year	Paper and Electronic	All offices, staff intranet areas	SECURE DISPOSAL
Wychwood Weekly	Current year + 1 year	Paper and Electronic	M&A Office, School office	Review to see whether a further retention period is required
Visitors' Sign In book	Current year + 2 years	Paper	School Office	Review to see whether a further retention period is required
Staff Room Sign Out Book for girls	Current year + 2 years	Paper	School Office	Review to see whether a further retention period is required
Staff Sign Out books	Current year + 2 years	Paper	School Office	Review to see whether a further retention period is required
Wychwood Association Minutes	Current year + 6 years	Paper and Electronic	Outside School	Review to see whether a further retention period is required
FoW Minutes	Current year + 6 years	Paper and Electronic	Outside School	Review to see whether a further retention period is required
WOGS Documentation	Current year + 6 years	Paper and Electronic	Outside School	Review to see whether a further retention period is required

## FINANCE

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Annual Accounts	Current Year + 6 years	Paper and Electronic		Review to see whether a further retention period is required
Finance Meeting minutes & papers	Current Year + 6 years	Paper and electronic	Bursar's office and Archive	Review to see whether a further retention period is required
Loans and grants	Date of last payment on loan + 12 years	Paper and Electronic	Bursar's Office	Review to see whether a further retention period is required
Annual Budget and background papers	Current year + 6 years	Paper and Electronic	Bursar's Office	SECURE DISPOSAL
Charity Commission returns	Current year + 10 years	Paper and electronic	Bursar's office	In public domain to no need for secure disposal
Hut project records	Permanently	Paper	Archive	
Appeals Records	Current year + 6 years then review	Paper and electronic	Archive	SECURE DISPOSAL
Birthday Fund Records	Current year + 6 years then review	Paper and electronic	M&A Office	SECURE DISPOSAL
Contracts under seal	Contract completion date + 13 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Contracts under signature	Contract completion date + 7 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Contracts Monitoring records	Current year + 2 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Invoice, receipts and other records covered by the Financial Regulations – some detailed below	Current year + 6 years	Paper and electronic		
Tax returns	Current year + 6 years	Paper and electronic	Bursar's PC/Area of network	
Bank Payments	Current year + 6 years	Paper and electronic	Bursar's PC/Area of network	
Bank Receipts	Current year + 6 years	Paper and electronic	Bursar's PC/Area	

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
			of network	
Cheque books	Current year + 6 years	Paper	Bursar's office	
Credit card statements	Current year + 6 years	Paper and electronic	Bursar's PC/Area of network	
Electricity bills	Current year + 6 years	Paper and electronic	School office/Accounts Assistant area of network	
Manual cheques	Current year + 6 years	Paper	Bursar's office	
Paying in books	Current year + 6 years	Paper	Bursar's office	
Billing ledger	Current year + 6 years	Paper and electronic	PASS	
Finance journals & notes	Current year + 6 years	Paper and Electronic	PASS and with Auditor	
Petty cash books	Current year + 6 years	Paper	School office	
Teachers' Pension submissions	Current year + 6 years	Paper and Electronic	PASS	
People's Pension submission	Current year + 6 years, but currently from inception in 2014.	Paper and Electronic	PASS	
BACS	Current year + 6 years	Paper and electronic	Bursar's PC/Area of network	
Payroll checklist	Current year + 6 years	Paper and electronic	Bursar's office and Archive	
Purchase ledger	Current year + 6 years	Paper and electronic	School office and Archive	
Delivery Documentation	Current year + 6 years	Paper and electronic	Bursar's office and Archive	SECURE DISPOSAL
Debtors' Records	Current year + 6 years	Paper and electronic	Bursar's office and Archive	SECURE DISPOSAL

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
Petty cash receipts	Current year + 6 years	Paper	School office and Archive	
Kitchen invoices	Current year + 6 years	Paper	School office and Archive	
Invoices	Current year + 6 years	Paper	School office and Archive	
Old ledgers, miscellaneous	Current year + 6 years	Paper	Archive	

## PROPERTY

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Title Deeds	Permanently	Paper	Bursar's Office	These should follow the property unless the property has been registered at the Land Registry
Plans	Permanently	Paper	Bursar's Office	Retain in School whilst operational
Maintenance and contractors	Current year + 6 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Leases	Expiry of Lease + 6 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Lettings	Current year + 3 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Burglary, theft and vandalism reports	Current year + 6 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Maintenance log books	Current year + 6 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL
Contractors' reports	Current year + 6 years	Paper and electronic	Bursar's Office	SECURE DISPOSAL

**ALUMNAE**

<b>Document</b>	<b>Retention time</b>	<b>Storage medium</b>	<b>Location</b>	<b>Action at end of administrative life of record</b>
Personal Contact Data	While permission is given until death. If permission is rescinded, the data is deleted from the database and from the Deleted Box .	WA database	School website	SECURE DISPOSAL



## INTELLECTUAL PROPERTY RECORDS

Document	Retention time	Storage medium	Location	Action at end of administrative life of record
Formal documents of title (Trade mark or registered design certificate; patent or utility model certificate)	Permanent of any right can be extended permanently (e.g. trade marks, or expiry of right + 7 years)	Paper or electronic	None as yet	SECURE DISPOSAL
Assignments of intellectual property to or from the school	As above in relation to contracts (7 years) or, where applicable, deeds (13 years).	Paper or electronic	None as yet	SECURE DISPOSAL
IP / IT agreements (including software licences and ancillary agreements eg maintenance; storage; development; coexistence agreements; consents)	Minimum – 7 years from completion of contractual obligation concerned or term of agreement	Paper or electronic		SECURE DISPOSAL