



Wychwood School
OXFORD

Data Requesting, Storage, Retention and Disposal Policy

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Date of Next Review: February 2023

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 in 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 Directors.

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 |

| Data | Initial collection | Seen by (going forward) | Frequency of Update / Confirmation Information is Correct | Sent by | When checked |
|---|--|--|--|--------------------------------------|----------------------------|
| | | 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 st 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 st 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 st 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 st 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 st Exeat Mich |

| Data | Initial collection | Seen by (going forward) | Frequency of Update / Confirmation Information is Correct | Sent by | When checked |
|--|-----------------------------------|---|--|------------------------------|---------------------|
| 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

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|-----------------------------|---|-----------------------|---------------------------------|---|
| 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 |

Directors

| 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 – director and staff copies | Date of meeting + 3 years | Paper | With staff or directors | 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 |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|---|---------------------------|-----------------------|----------------------------|---|
| | | | | 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. |
| Wychwood School (Charity) Finance Committee Minutes | Date of meeting + 6 years | Paper and electronic | Paper - Bursar's office | SECURE DISPOSAL |
| Wychwood School (Charity) 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 |
|---|---|----------------------|----------------------------------|---|
| SLT Minutes | Retain in school for 5 years from date of Meeting | Paper and electronic | With SLT, 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 | DOB of the pupil + 25 years (or, if pupil not admitted, normally 1 year after their proposed initial entrance point). | 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 Website? | 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 |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|---|-----------------------------------|-----------------------|---------------------------|---|
| 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 |
| Macro Business Plan | Current year + 6 years | Paper and electronic | 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 |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|-------------------------------|------------------------|-----------------------|-----------------|--|
| | | | | end of each year and allocate a 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 is Wychwood's policy to retain staff SCR details 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 if no such permission given | Paper and Electronic | In school office | SECURE DISPOSAL |
| Application forms / recruitment information from staff interviewed but not appointed | Interview date + 1 month after interview unless consent given to retain 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. If appointed placed on personnel file. | Paper and Electronic | In school office | SECURE DISPOSAL |
| Immigration records | If appointed on personnel file. Then minimum – 4 years after end of contract. | Paper and electronic | In school office | SECURE DISPOSAL |
| Pre-employment vetting information (including DBS checks) | Date of check + 6 months if not appointed. If appointed – placed on personnel file | Paper and electronic | In school office | SECURE DISPOSAL |
| Disciplinary proceedings - written warning | Date of warning + 12 months | Paper and electronic | In school office on | SECURE DISPOSAL |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|---|---|---|---------------------------------------|---|
| | | | personnel file | |
| 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 |
| Ecclesiastical Insurance | Permanently | Paper | Bursar's Office | SECURE DISPOSAL |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|---|-----------------|----------------------|-----------------|--|
| 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 | |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|-------------------------------|---|-----------------------|--|---|
| | | | 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 |

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|----------------------------|------------------------|-----------------------|---------------------------|---|
| 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

| Document | Retention time | Storage medium | Location | Action at end of administrative life of record |
|-----------------------|---|-----------------------|-----------------|---|
| 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 |