

## Forge Trust Retention Schedule

**Approved by:** The Trust Board **Date:** 27/02/24

**Next review due by:** March 2027

Pupil records	Until child is 25 years old
Safeguarding / Child Protection data	DOB + 25 years
SEN	DOB + 25 years
EAL	<i>part of pupil record</i>
Exclusion, behaviour	<i>part of pupil record</i>
Reports	<i>part of pupil record</i>
Examination results / Statutory Assessments	Current year + 6 years

Attendance registers	Date of entry + 3 years
Student photos	<i>retained on pupil record</i>
<b>Staff data (within MIS)</b>	
Staff Personal File	Termination of employment + 6 years
Performance / CPD data	<i>part of personal file</i>
Staff absence data	<i>part of personal file</i>
Staff photos	<i>part of personal file</i>
<b>Other Personnel Data</b>	
Recruitment records for new Principal	Date of recruitment + 6 years
Recruitment of new staff	Date of recruitment of successful candidate + 6 months
DBS / vetting checks	Note of proof on personal file / physical copies > 6 months
Appraisal / CPD data	Current year + 5 years
Disciplinary and grievance records	Date of warning + 6-18 months / <b>take advice</b>
Allegation of a child protection matter	Until retire (or 10 years from allegation if longer) / <b>take advice</b>
Malicious allegation of a child protection matter	Dispose at end of case / <b>take advice</b>
Health and safety assessments	Date of meeting + 3 years, then review
Health and safety accident reports	<b>take advice</b> as depends on nature of event
Admissions papers (successful or unsuccessful)	Date of admissions or case resolution + 1 year
Student medical records and reports	DOB + 25 years
Student social service records and reports	DOB + 25 years
<b>Financial matters</b>	
Annual accounts	Current year + 6 years
Purchase Orders, Invoices, Payments	Current year + 6 years
Records around budget management	Current year + 3 years
Asset management	Current year + 6 years
School Fund	

FSM* - free school meals registers	Current year + 6 years
School meals registers	Current year + 6 years
Records relating to school lettings	Current year + 3 years
Records relating to school maintenance	Current year + 6 years
	Current year + 6 years
<b>Access control / passwords* into systems</b>	
Authorise data access / Nominated Contacts	
Password to DfE or LA systems	<i>Until changes in personnel or in-line with password policy</i>
Network administration / password lists	<i>Until changes in personnel or in-line with password policy</i>
USO password information	<i>Until changes in personnel or in-line with password policy</i>
Email management	<i>Until changes in personnel or in-line with password policy</i>
Web filtering management	<i>Until changes in personnel or in-line with password policy</i>
School website administration	<i>Until changes in personnel or in-line with password policy</i>
Social media platforms, e.g. Twitter	<i>Until changes in personnel or in-line with password policy</i>
Learning Platform password information	<i>Until changes in personnel or in-line with password policy</i>
	<i>Until changes in personnel or in-line with password policy</i>
<b>Communications</b>	
Information added to website	
Information added to social media	<i>Until changes in personnel or in-line with password policy</i>
Learning Platform content	<i>Until changes in personnel or in-line with password policy</i>
Parental messaging system correspondence	<i>Until changes in personnel or in-line with password policy</i>
USO School Open Check	<i>Date of correspondence + 3 years</i>
Back-up media (where on site)	<i>Until school re-opens / closes</i>
Back-up media in Cloud	<i>Daily back-ups with back-ups up to one year</i>
Emergency mobile phone loaded with data	<i>Check Cloud providers' retention and deletion criteria</i>
	<i>Whilst staff in school and numbers valid</i>
<b>Trustees</b>	
Trustees' documents with sensitive content	
Trustees' standard published meeting documents	Date of meeting + 10 years
Reports presented to Trustees meeting	Date of meeting + 6 years

Annual Trustees reports	Date of meeting + 6 years
Annual parents' meeting papers	Date of meeting + 10 years
Policies and plans administered by Trustee Board	Date of meeting + 6 years
	Life of policy + 3 years
<b>Other T&amp;L potentially sensitive material</b> <i>(list not exhaustive)</i>	
Student photos* (not required for pupil record)	
Staff photos* (not required for Personal record)	<i>Relevant life of the photo / annual house-keeping</i>
Early Years assessments (not in core MIS)	<i>Relevant life of the photo / annual house-keeping</i>
Student reports (not in core MIS)	<i>Current year + 6 years</i>
Student assessments (not in core MIS)	<i>Current year + 6 years</i>
Third Party comparative performance data	<i>Current year + 6 years</i>
	<i>Current year + 6 years</i>
<b>Other operational potentially sensitive material</b> <i>(list not exhaustive)</i>	
CCTV saved footage	
Visitor signing-in book / management system	90 days
Biometric system - registration	Current year + 6 years / review
<i>Biometric system - other</i>	Date of entry + 3 years
Newsletters and information with a short operational life	
	<i>current year + 1 year</i>