



GIGGLESWICK SCHOOL

Data Retention Policy

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1 THIS POLICY

This policy outlines the procedures for retaining and disposing of data at Giggleswick School ("the School") and in doing so ensures compliance with the Data Protection Act 2018, UK GDPR, Data (Use and Access) Act 2025 (DUAA) and other relevant legislation.

2 PURPOSE

The purpose of this policy is to:

- Ensure that data is retained for the appropriate period
 - Protect personal data and maintain confidentiality.
 - Comply with legal and regulatory requirements.
 - Minimise storage costs and improve data management.
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3 SCOPE

This policy applies to all records, both digital and paper, created, received, and maintained by Giggleswick School; with the term "record" meaning any document or item of data which contains evidence or information relating to the personal data of pupils, staff and other stakeholders.

Some, but not all, will contain personal data. Many, if not most, new and recent records will be created, received and stored electronically. Others (such as Certificates, Registers, or older records) may be original paper documents. Critically, the format of the record is less important than its contents and the purpose for keeping it.

4 RECORD STORAGE AND MANAGEMENT

Access to data will be restricted to authorised personnel only. All data will be stored securely to prevent unauthorized access, loss, or damage, with records themselves being stored in a manner in which they can be made available when required and (where necessary) searchable.

Access to sensitive data – or any large quantity of data – should as a minimum be password-protected and held on a limited number of devices, with passwords provided on a need-to-know basis and regularly changed.

Paper records should be stored in appropriate, secure conditions (dry, cool, reasonable ventilation, no direct sunlight; avoid storing with metals, rubber or plastic which might deteriorate or damage the paper). Paper records are only classed as personal data if held in a qualifying "filing system". This means organised, and/or indexed, such that specific categories of personal information relating to a certain individual are readily accessible, and thus searchable as a digital database might be.

Important records, and large or sensitive personal databases, must not be taken home or – in respect of digital data – carried or kept on portable devices (whether CDs or data sticks, or mobiles and handheld electronic tablets) unless absolutely necessary, *in which case* it should be subject to a risk assessment and controls put in place which include security of the portable device, password protection and appropriate lock screen settings.

Arrangements with external storage providers – whether physical or electronic (in any form, but most particularly "cloud-based" storage) – must be supported by robust contractual arrangements providing for security and access.

Reviews should be conducted on a regular basis, in line with the guidance in this policy, to ensure that all information being kept is still relevant and – in the case of personal data – necessary for the purposes for which it is held (and if so, that it is accurate and up-to-date).

4 DATA RETENTION PERIODS

The Annex to this policy shows the data retention period for different types of data. Unless otherwise required by law data should be maintained in accordance with the direction contained within the annex.

5 DATA DESTRUCTION

Data that is no longer required will be disposed of securely. Paper records will be shredded, and digital records will be permanently deleted. Third-party disposal services will be used where necessary, ensuring they comply with data protection regulations.

More specifically, confidential, sensitive or personal information will only be deemed to have been disposed of, if it is in a condition where it cannot either be read or reconstructed. Skips and 'regular' waste disposal will not be considered secure. Paper records should be shredded using a cross-cutting shredder; devices for digital storage should be cut into pieces. Hard-copy images, AV recordings and hard disks should be dismantled and destroyed.

For any questions regarding this policy, please contact the data protection officer at Giggleswick school.

ANNEX - TABLE OF RETENTION PERIODS

Type of Record/Document	Retention Period
<p>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>Minimum 10 years from date of meeting, and then archived.</p> <p>From end of year: 3 years (or 1 year for other class records: e.g. marks / timetables / assignments)</p>
<p>INDIVIDUAL PUPIL RECORDS</p> <ul style="list-style-type: none"> Admissions: application forms, assessments, records of decisions Attendance Records: Examination results (external or internal) Pupil file including: <ul style="list-style-type: none"> Pupil reports Pupil performance records Pupil medical records Special educational needs records (<i>to be risk assessed individually</i>) 	<p><i>NB – this will generally be personal data</i></p> <p>25 years from date of birth (or, if pupil not admitted, up to 7 years from that decision).</p> <p>3 years from the end of the academic year.</p> <p>7 years from pupil leaving school.</p> <p>ALL: 25 years from date of birth (subject where relevant to safeguarding considerations). Any material which may be relevant to potential claims should be kept for the lifetime of the pupil.</p> <p>Date of birth plus up to 35 years (allowing for special extensions to statutory limitation period).</p>
<p>SAFEGUARDING</p> <ul style="list-style-type: none"> Policies and procedures DBS disclosure certificates (if held) Accident / Incident reporting Child Protection files 	<p>Keep a permanent record of historic policies.</p> <p><u>No longer than 6 months</u> from decision on recruitment, unless DBS specifically consulted – but a record of the checks being made must be kept, if 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.</p> <p>If a referral has been made / social care have been involved or child has been subject of a multi-agency plan – indefinitely.</p>



Type of Record/Document	Retention Period
	If low level concerns, with no multi-agency act – apply applicable school low-level concerns policy rationale (this may be 25 years from date of birth OR indefinitely).
<p><u>CORPORATE RECORDS</u></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>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><u>ACCOUNTING RECORDS</u></p> <ul style="list-style-type: none"> • Accounting records • Tax returns • VAT returns • Invoices • Budget and internal financial reports 	<p>3 years for private UK companies (except where still necessary for tax returns).</p> <p>6 years for UK charities (and public companies) from the end of the financial year in which the transaction took place.</p> <p>Internationally: can be up to 20 years depending on local legal/accountancy requirements.</p> <p>6 years from the end of the financial year.</p> <p>6 years from the end of the financial year.</p> <p>6 years from the end of the financial year.</p> <p>Minimum – 3 years</p>
<p><u>CONTRACTS AND AGREEMENTS</u></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>



Type of Record/Document	Retention Period
<p><u>INTELLECTUAL PROPERTY RECORDS</u></p> <ul style="list-style-type: none"> • Formal documents of title (trade mark or registered design certificates; patent or utility model certificates) • Assignments of intellectual property to or from the school • IP / IT agreements (including software licences 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><u>EMPLOYEE / PERSONNEL RECORDS</u></p> <ul style="list-style-type: none"> • Single Central Record of employees • Contracts of employment • 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) • Immigration records • Health records relating to employees 	<p><i>NB this will contain personal data</i></p> <p>Keep a permanent record that mandatory checks have been undertaken (but do <u>not</u> keep DBS certificate information itself unless permission has been granted from the individual).</p> <p>7 years from effective date of end of contract.</p> <p>Duration of employment and plus 5 years.</p> <p>As above, but <u>do not delete any information which may be relevant to historic safeguarding claims.</u></p> <p>6 years from the end of the financial year.</p> <p>Possibly permanent, depending on nature of scheme.</p> <p>Minimum 3 months but no more than 1 year.</p> <p>Minimum – 4 years.</p> <p>7 years from end of contract of employment.</p>
<p><u>INSURANCE RECORDS</u></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>

Type of Record/Document	Retention Period
<ul style="list-style-type: none"> Correspondence related to claims/ renewals/ notification re: insurance 	Minimum – 7 years.
<p><u>ENVIRONMENTAL, HEALTH & DATA</u></p> <ul style="list-style-type: none"> Maintenance logs Accidents to children. Accident at work records (staff) Staff use of hazardous substances 	<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>
<ul style="list-style-type: none"> Risk assessments (carried out in respect of above) 	7 years from completion of relevant project, incident, event or activity.
<ul style="list-style-type: none"> 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).