



Disposal of Records Schedule
For

The Cardinal Newman Catholic Educational Trust

Date	People involved	Notes
April 2024	Gloria Speed (Estates & Operations Lead)	Version: 1

1. Management & Organisation

Ref	Record	Minimum Retention Period	Action After Retention
1.1	Board of Governors – general correspondence	Current school year + 6 years	Destroy
1.2	BOG Meetings Minutes (master)	Current school year + 6 years	Offer to Bristol City Council (BCC) Archives for Permanent Preservation
1.3	Senior Management Team-Meeting Minutes	Current school year + 6 years	Offer to BCC for Permanent Preservation
1.4	Staff Meeting Minutes	Current school year + 6 years	Destroy
1.5	School Development Plan	Retain in school for 10 years from closure of Plan	Offer to BCC for Permanent Preservation
1.6	School Policies	Retain while current. Retain 1 copy of old policy for 2 years after being replaced	Destroy
1.7	PTA – minutes and general correspondence	Current school year + 6 years	Destroy
1.8	Visitors Book	Current school year + 6 years	Destroy
1.9	Circulars to Staff, Parents and Pupils	Current school year + 3 years	Destroy
1.10	School Brochure or Prospectus	Current school year + 3 years	Destroy

1.11	Comments/Complaints	5 years after closing. Review for further retention in the case of contentious disputes	Destroy
1.12	Annual Report	Retain in school for 10 years from date of Report	Offer to BCC for Permanent Preservation
1.13	School Fund	Current financial year + 6 years	Destroy
1.14	Emergency Planning/Business Continuity Plan	Until superseded	Destroy

2. Legislation and Guidance from DfE, etc

Ref	Record	Minimum Retention Period	Action After Retention
2.1	Circulars, Guidance, Bulletins from DfE, etc	Until superseded	Destroy
2.2	Correspondence re: Statistical Returns to DfE, BCC etc	Current financial year + 6 years	Destroy
2.3	DfE Reports, Inspections etc OFSTED	Until superseded	Destroy

3. Pupils

Ref	Record	Minimum Retention Period	Action After Retention
3.1	<i>Pupil Admission Data</i>	3 years after creation of record	Offer to BCC Archives for Permanent Preservation
3.1a	Applications for enrolment	3 years after enrolment	Destroy
3.1b	Transfer applications (Transfer Forms)	3 years after enrolment	Destroy
3.2	Pupil Attendance Information/Registers	Date of Register + 10 years	Offer to BCC Archives for Permanent Preservation
3.3	Pupil Education Records - School/Progress Reports etc	Until pupil is 23 years old	Destroy
3.4	Pupil Education Records - School/Progress Reports etc (Special Educational Needs)	Record should follow the pupil should they transfer to another primary school or, to a secondary school or pupil referral unit	
3.5	Child Protection Information- Record of concerns where case was not referred to Social Services	10 years after last entry on file	Destroy
3.6	Child Protection Information- Social Services investigation outcome was unfounded or malicious	10 years after last entry on file	Destroy
3.7	Child Protection Information- Social Services investigation outcome was inconclusive, unsubstantiated or substantiated	Until pupil is 30 years old	Destroy

3.8	Disciplinary Action (Suspension/Expulsion)/Offences – bullying	Until pupil is 23 years old	Destroy
3.9	Disciplinary Action (Suspension/Expulsion)/Offences – bullying (Special Educational Needs)	Until pupil is 26 years old	Destroy
3.10	Timetables + Class Groupings	Retain while current	Destroy
3.11	Examination Results	Current school year + 6 years	Destroy
3.12	Careers Advice	Current school year + 6 years	Destroy
3.13	School Meals returns	Current financial year + 6 years	Destroy
3.14	Free Meals registers	Current financial year + 6 years	Destroy
3.15	School Trips – Financial & Administration details	Current financial year + 6 years	Destroy
3.16	School Trips-Attendance/Staff Supervision etc	Current financial year + 6 years. In the case of an incident/accident involving a pupil, retain until pupil is 23 years old or 26 for a pupil with special educational needs	Destroy
3.17	Reports of Stolen/Damaged Items	Current financial year + 6 years	Destroy
3.18	Medical Records – records of pupils with medical conditions and details for the administration of drugs when necessary.	Until pupil is 23years old or in the case of a Special Needs Pupil, until 26 years old	Destroy

4. Staff

Ref	Record	Minimum Retention Period	Action After Retention
4.1	Staff Personnel Records (including, appointment details, training, staff development etc.)	7 years after leaving employment	Destroy
4.2	Interview notes and recruitment records	Date of interview + 6 months	Destroy
4.3	Staff Salary Records	7 years after leaving employment	Destroy
4.4	Staff Sickness Records (copies of Medical Certs)	Current school year + 6 years	Destroy
4.5	Substitute Teacher Records	Current school year + 6 years	Destroy
4.6	Substitute Staff Records-non teaching (cover for nursery assistants)	Current school year + 6 years	Destroy
4.7	Student Records-non teaching (e.g. nursery assistant students & pupils from schools on work experience)	Current school year + 6 years	Destroy
4.8	Student Teachers on Teaching Practice – student teacher progress	Current school year + 6 years	Destroy
4.9	Procedures for Induction of Staff	Until superseded	Destroy
4.10	Staff/Teachers' Attendance Records	7 years after leaving	Destroy

4.11	Staff Performance Review	7 years after leaving	Destroy
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5. Finance

Ref	Record	Minimum Retention Period	Action After Retention
5.1	Annual budget and budget deployment	Current financial year + 6 years	Destroy
5.2	Budget Monitoring	Current financial year + 6 years	Destroy
5.3	Annual Statement of Accounts	Current financial year + 6 years	Destroy
5.4	Order Books, Invoices, Bank Records, Cash Books, Till Rolls, Lodgement books etc	Current financial year + 6 years	Destroy
5.5	Postage Book	Current financial year + 6 years	Destroy
5.6	Audit Reports	Current financial year + 6 years	Destroy

6. Health & Safety

Ref	Record	Minimum Retention Period	Action After Retention
6.1	Accident Reporting (Adults)	Date of incident + 7 years	Destroy
6.2	Accident Reporting (Children)	Until pupil is 23years old or in the case of a Special Needs pupil, until 26 years old	Destroy
6.3	Risk Assessments – work experience locations/pupils	7 years	Destroy

6.4	H & S Reports	15 years	Destroy
6.5	Fire Procedure	Until superseded	Destroy
6.6	Security System File	For the life of the system	Destroy