

December 2025

Summary of key retention rules by category :

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## 1. Contracts

- **Under Seal:** Last payment or end of contract + **12 years**
  - **Under Signature:** Last payment or end of contract + **6 years**
  - **Maintenance Records:** Life of equipment + **6 years**
  - **Software Licences:** Licence expiry + **6 years**
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## 2. Education Management

- **Policies & Frameworks:** Life of policy or superseded + **3 years**
  - **Strategic Plans:** Life of plan or superseded + **3 years**
  - **Accessibility Plan:** Life of plan or superseded + **3 years** (Equality Act 2010)
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## 3. Examinations

- **School Copy of Results:** Current year + **6 years**
  - **Pupil Copies:** Added to pupil file
  - **Exam Registrations:** As per exam board guidance
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## 4. Finance

- **Invoices & Receipts:** Current financial year + **6 years**
  - **Payroll Records:** Current year + **6 years**
  - **Insurance Certificates:** Year of issue + **40 years**
  - **Annual Accounts:** Current year + **6 years**
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## 5. Governing Bodies and Board of Trustees

- **Board Minutes:** At least **10 years** (Companies Act 2006)
  - **Register of Directors:** Resignation + **10 years**
  - **Complaints:** Resolved + **3 years** (or longer for safeguarding)
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## 6. Health & Safety

### December 2025

- **Accident Reports (Adults):** Incident + **3 years** (or 15 years if negligence)
  - **Accident Reports (Children):** Incident + **25 years**
  - **Asbestos Monitoring:** Last action + **40 years**
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### 7. Pupils & SEND

- **Educational Record:** Date of birth + **25 years**
  - **SEND Files:** Date of birth + **25 years**
  - **Child Protection:** Date of birth + **25 years**
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### 8. Staff Records

- **Personal File:** Termination + **6 years**
  - **DBS Checks:** Date of check + **6 months**
  - **Training (Child-related):** Date of training + **40 years**
  - **Payroll & Tax:** Current year + **6 years**
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### 9. Property & Assets

- **Title Deeds:** Life of property
  - **Leases:** Expiry + **6 years**
  - **Plans & Alterations:** While building belongs to school
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### 10. GDPR Requests

- **Subject Access Requests (SAR):** **3 years** from request
  - **ERR Requests:** **3 years** from request
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