



Grimoldby Primary School

Freedom of Information Policy

Date Approved: July 2025

Date for Review: July 2027

1) Statement of intent

- a) This policy outlines the management of records by the school, including retention periods and how records are removed.

2) Management of pupil records

- a) Pupil records are specific documents that are used throughout a pupil's time in the education system – they are passed to each school that a pupil attends and includes all personal information relating to them. These records may be digital (ie: via *Integris* or CPOMs).
- b) The following information is stored on a pupil record (pupil records are held in the school office).
 - Forename, surname, gender and date of birth
 - Unique Pupil Number (UPN)
 - Note of the date when the file was opened
 - Note of the date when the file was closed, if appropriate
 - First language (if not English)
 - Any preferred names
 - Position in their family, e.g. eldest sibling
 - Emergency contact details and the name of the pupil's doctor
 - Any allergies or other medical conditions that are important to be aware of
 - Names of parents, including their home address(es), telephone number(s) and email address(es)
 - Name of the school, admission number, the date of admission and the date of leaving, where appropriate
 - If the pupil has attended an Early Years setting, the record of transfer
 - National curriculum and agreed syllabus record sheets
 - Notes relating to major incidents and accidents involving the pupil
 - Any correspondence with parents or external agencies relating to major issues, e.g. mental health
 - Notes indicating that records of complaints made by parents or the pupil are held
 - Absence notes
 - Parental consent forms for educational visits, photographs and videos, etc.

- Any information relating to exclusions
- c) The following information may be held by the SENDCo on separate pupil files, kept locked in a filing cabinet in the Meeting Room or kept digitally via CPOMs:
- Any other agency involvement, e.g. speech and language therapist
 - Details of any SEND
 - Any information about an education and healthcare (EHC) plan and support offered in relation to the EHC plan
 - Any notes indicating child protection disclosures and reports are held
- d) Historic Safeguarding records, including disclosures and reports relating to child protection are stored in a file in a locked cupboard in the Headteacher's office.
- e) The school will ensure that no pupil records are altered or amended before transferring them to the next school that the pupil will attend.
- f) The only exception to the above is if any records placed on the pupil's file have a shorter retention period and may need to be removed. In such cases, the DPO responsible for disposing records, will remove these records.
- g) Electronic records relating to a pupil's record will also be transferred to the pupils' next school.
- h) The school will not keep any copies of information stored within a pupil's record, unless there is ongoing legal action at the time during which the pupil leaves the school. The responsibility for these records will then transfer to the next school that the pupil attends.
- i) The school will, wherever possible, avoid sending a pupil record by post. Where a pupil record must be sent by post, it will be sent by registered post, with an accompanying list of the files included. The school it is sent to is required to sign a copy of the list to indicate that they have received the files and return this to the school.

3) Retention of pupil records and other pupil-related information

- a) The table below outlines the school's retention periods for individual pupil records and the action that will be taken after the retention period, in line with any requirements.
- b) Electronic copies of any information and files will be destroyed in line with the retention periods below.

Type of file	Retention period	Action taken after retention period ends
Personal identifiers, contacts and personal characteristics		
Images used for identification purposes	For the duration of the event/activity, or whilst the pupil remains at school, whichever is less, plus one month	Securely disposed of
Images used in displays in schools	Whilst the pupil is at school	Securely disposed of
Images used for marketing purposes	In line with the consent period	Securely disposed of

Postcodes, names and characteristics	Whilst the pupil is at school, plus five years	Securely disposed of
House number and road	Whilst the pupil is at school, plus five years	Securely disposed of

Admissions		
Register of admissions	Whilst the pupil remains at the school, plus one year	Information is reviewed and the register may be kept permanently
Admissions appeals	Whilst the pupil remains at school, plus five years	Securely disposed of
Proof of address (supplied as part of the admissions process)	Whilst the pupil remains at the school, plus one year	Securely disposed of
Supplementary information submitted, including religious and medical information etc. (where the admission was successful)	Whilst the pupil remains at the school, plus one year	Securely disposed of
Supplementary information submitted, including religious and medical information etc. (where the admission was not successful)	Whilst the pupil remains at the school, plus five years	Securely disposed of

Pupils' educational records		
Pupils' educational records	Whilst the pupil remains at the school	Transferred to the next destination – if this is an independent school, home-schooling or outside of the UK, the file will be kept by the LA and retained for the statutory period
Public examination results	Added to the pupil's record and transferred to next school Copies with pupils' names are held whilst the pupil is at school, plus five years Copies with pupils' names removed are held for 25 years after the pupil's date of birth	Securely disposed of
Internal examination results	Added to the pupil's record and transferred to next school	Securely disposed of

	<p>Copies with the pupil's personal data are held whilst the pupil is at school, plus five years</p> <p>Copies with personal data removed are held for 25 years after the pupil's date of birth</p>	
Behaviour records	<p>Added to the pupil's record and transferred to the next school</p> <p>Copies are held whilst the pupil is at school, plus one year</p>	Securely disposed of
Exclusion records	<p>Added to the pupil's record and transferred to the next school</p> <p>Copies are held whilst the pupil is at school, plus one year</p>	Securely disposed of
Child protection information held on a pupil's record	<p>Stored in a sealed envelope for the same length of time as the pupil's record</p>	Securely disposed of – shredded
Child protection records held in a separate file	<p>25 years after the pupil's date of birth</p>	Securely disposed of – shredded

Attendance

Attendance registers	<p>Whilst the pupil remains at school, plus one year</p> <p>Non-identifiable summary statistics are held after the initial retention period for 25 years after the pupil's date of birth</p>	Securely disposed of
Letters authorising absence	<p>Whilst the pupil remains at school, plus one year</p> <p>Non-identifiable summary statistics are held after the initial retention period for 25 years after the pupil's date of birth</p>	Securely disposed of

Medical information and administration

Permission slips	For the duration of the period that medication is given, plus one month	Securely disposed of
Medical conditions – ongoing management	Added to the pupil's record and transferred to the next school Copies held whilst the pupil is at school, plus one year	Securely disposed of
Medical incidents that have a behavioural or safeguarding influence	Added to the pupil's record and transferred to the next school Copies held whilst the pupil is at school, plus 25 years	Securely disposed of

SEND		
SEND files, reviews and individual education plans	25 years after the pupil's date of birth (as stated on the pupil's record)	Information is reviewed and the file may be kept for longer than necessary if it is required for the school to defend themselves in a 'failure to provide sufficient education' case
An EHC plan maintained under section 37 of the Children and Families Act 2014 (and any amendments to the statement or plan)	25 years after the pupil's date of birth (as stated on the pupil's record)	Securely disposed of, unless it is subject to a legal hold
Information and advice provided to parents regarding SEND	25 years after the pupil's date of birth (as stated on the pupil's record)	Securely disposed of, unless it is subject to a legal hold
Accessibility strategy	25 years after the pupil's date of birth (as stated on the pupil's record)	Securely disposed of, unless it is subject to a legal hold

Curriculum management		
SATs results	25 years after the pupil's date of birth (as stated on the pupil's record)	Securely disposed of
Examination papers	Until the appeals/validation process has been completed	Securely disposed of

Published Admission Number (PAN) reports	Current academic year, plus six years	Securely disposed of
Value added and contextual data	Current academic year, plus six years	Securely disposed of
Self-evaluation forms	Current academic year, plus six years	Securely disposed of
Pupils' work	Returned to pupils at the end of the academic year, or retained for the current academic year, plus one year	Securely disposed of

Extra-curricular activities		
Field file – information taken on school trips	Until the conclusion of the trip, plus one month Where a minor incident occurs, field files are added to the core system as appropriate	Securely disposed of
Financial information relating to school trips	Whilst the pupil remains at school, plus one year	Securely disposed of
Parental consent forms for school trips where no major incident occurred	Until the conclusion of the trip	Securely disposed of
Parental consent forms for school trips where a major incident occurred	25 years after the pupil's date of birth on the pupil's record (permission slips of all pupils on the trip will also be held to show that the rules had been followed for all pupils)	Securely disposed of
Educational visitors in school – sharing of personal information	Until the conclusion of the visit, plus one month	Securely disposed of

Family Support Work		
Day books	Current academic year, plus two years	Reviewed and destroyed if no longer required
Reports for outside agencies	Duration of the pupil's time at school	Securely disposed of
Referral forms	Whilst the referral is current	Securely disposed of

Contact data sheets	Current academic year	Reviewed and destroyed if no longer active
Contact database entries	Current academic year	Reviewed and destroyed if no longer required
Group registers	Current academic year, plus two years	Securely disposed of

Catering and free school meal management		
Meal administration	Whilst the pupil is at school, plus one year	Securely disposed of
Meal eligibility	Whilst the pupil is at school, plus five years	Securely disposed of

4) Retention of staff records

- a) The table below outlines the school's retention period for staff records and the action that will be taken after the retention period, in line with any requirements.
- b) Electronic copies of any information and files will also be destroyed in line with the retention periods below.

Type of file	Retention period	Action taken after retention period ends
Operational		
Staff members' personal file	Termination of employment, plus six years	Securely disposed of
Timesheets	Current academic year, plus six years	Securely disposed of
Annual appraisal and assessment records	Current academic year, plus five years	Securely disposed of

Recruitment		
Records relating to the appointment of a new headteacher	Date of appointment, plus six years	Securely disposed of
Records relating to the appointment of new members of staff (unsuccessful candidates)	Date of appointment of successful candidate, plus six months	Securely disposed of
Records relating to the appointment of new members of staff (successful candidates)	Relevant information added to the member of staff's personal file and other information retained for six months	Securely disposed of
DBS certificates	Up to six months	Securely disposed of

Proof of identify as part of the enhanced DBS check	After identity has been proven	Reviewed and a note kept of what was seen and what has been checked – if it is necessary to keep a copy this will be placed on the staff member’s personal file, if not, securely disposed of
Evidence of right to work in the UK	Added to staff personal file or, if kept separately, termination of employment, plus no longer than two years	Securely disposed of

Disciplinary and grievance procedures		
Child protection allegations, including where the allegation is unproven	Added to staff personal file, and until the individual’s normal retirement age, or 10 years from the date of the allegation – whichever is longer If allegations are malicious, they are removed from personal files	Reviewed and securely disposed of – shredded
Oral warnings	Date of warning, plus six months	Securely disposed of – if placed on staff personal file, removed from file
Written warning – level 1	Date of warning, plus six months	Securely disposed of – if placed on staff personal file, removed from file
Written warning – level 2	Date of warning, plus 12 months	Securely disposed of – if placed on staff personal file, removed from file
Final warning	Date of warning, plus 18 months	Securely disposed of – if placed on staff personal file, removed from file
Records relating to unproven incidents	Conclusion of the case, unless the incident is child protection related and is disposed of as <u>above</u>	Securely disposed of

5) Retention of senior leadership and management records

- a) The table below outlines the school’s retention periods for senior leadership and management records, and the action that will be taken after the retention period, in line with any requirements.
- b) Electronic copies of any information and files will also be destroyed in line with the retention periods below.

Type of file	Retention period	Action taken after retention period ends
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Governing board		
Agendas for governing board meetings	One copy alongside the original set of minutes – all others disposed of without retention	Securely disposed of
Original, signed copies of the minutes of governing board meetings	Permanent	
Inspection copies of the minutes of governing board meetings	Date of meeting, plus three years	Shredded if they contain any sensitive and personal information
Reports presented to the governing board	Minimum of six years, unless they refer to individual reports – these are kept permanently	Securely disposed of or, if they refer to individual reports, retained with the signed, original copy of minutes
Instruments of government, including articles of association	Permanent	
Trusts and endowments managed by the governing board	Permanent	Retained in the school whilst it remains open, then provided to the county archives service when the school closes
Action plans created and administered by the governing board	Duration of the action plan, plus three years	Securely disposed of
Policy documents created and administered by the governing board	Duration of the policy, plus three years	Securely disposed of
Records relating to complaints dealt with by the governing board	Date of the resolution of the complaint, plus a minimum of six years	Reviewed for further retention in case of contentious disputes, then securely disposed of
Annual reports created under the requirements of The Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	Date of report, plus 10 years	Securely disposed of
Proposals concerning changing the status of the school	Date proposal accepted or declined, plus three years	Securely disposed of

Headteacher and senior leadership team (SLT)		
Reports created by the headteacher or SLT	Date of the report, plus a minimum of three years	Reviewed and securely disposed of
Records created by the headteacher, deputy headteacher, senior leaders and other members of staff with administrative responsibilities	Current academic year, plus six years	Reviewed and securely disposed of

Correspondence created by the headteacher, deputy headteacher, heads of year and other members of staff with administrative responsibilities	Date of correspondence, plus three years	Reviewed and securely disposed of
Professional development plan	Duration of the plan, plus six years	Securely disposed of
School development plan	Duration of the plan, plus three years	Securely disposed of

6) Retention of health and safety records

- a) The table below outlines the school's retention periods for health and safety records, and the action that will be taken after the retention period, in line with any requirements.
- b) Electronic copies of any information and files will also be destroyed in line with the retention periods below.

Type of file	Retention period	Action taken after retention period ends
Health and safety		
Health and safety policy statements	Duration of policy, plus three years	Securely disposed of
Health and safety risk assessments	Duration of risk assessment, plus three years	Securely disposed of
Records relating to accidents and injuries at work	Date of incident, plus 12 years. In the case of serious accidents, a retention period of 15 years is applied	Securely disposed of
Accident reporting – adults	Date of the incident, plus six years	Securely disposed of
Accident reporting – pupils	25 years after the pupil's date of birth, on the pupil's record	Securely disposed of
Control of substances hazardous to health	Current academic year, plus 40 years	Securely disposed of
Information relating to areas where employees and persons are likely to come into contact with asbestos	Date of last action, plus 40 years	Securely disposed of
Information relating to areas where employees and persons are likely to come into contact with radiation	Date of last action, plus 50 years	Securely disposed of

Fire precautions log books	Current academic year, plus six years	Securely disposed of
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7) Retention of financial records

- a) The table below outlines the school's retention periods for financial records and the action that will be taken after the retention period, in line with any requirements.
- b) Electronic copies of any information and files will also be destroyed in line with the retention periods below.

Type of file	Retention period	Action taken after retention period ends
Payroll pensions		
Maternity pay records	Current academic year, plus three years	Securely disposed of
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Current academic year, plus six years	Securely disposed of

Risk management and insurance		
Employer's liability insurance certificate	Closure of the school, plus 40 years	Securely disposed of

Asset management		
Inventories of furniture and equipment	Current academic year, plus six years	Securely disposed of
Burglary, theft and vandalism report forms	Current academic year, plus six years	Securely disposed of

Accounts and statements including budget management		
Annual accounts	Current academic year, plus six years	Disposed of against common standards
Loans and grants managed by the school	Date of last payment, plus 12 years	Information is reviewed then securely disposed of
All records relating to the creation and management of budgets	Duration of the budget, plus three years	Securely disposed of
Invoices, receipts, order books, requisitions and delivery notices	Current financial year, plus six years	Securely disposed of

Records relating to the collection and banking of monies	Current financial year, plus six years	Securely disposed of
Records relating to the identification and collection of debt	Current financial year, plus six years	Securely disposed of

Contract management		
All records relating to the management of contracts under seal	Last payment on the contract, plus 12 years	Securely disposed of
All records relating to the management of contracts under signature	Last payment on the contract, plus six years	Securely disposed of
All records relating to the monitoring of contracts	Current academic year, plus two years	Securely disposed of

School fund		
Cheque books, paying in books, ledgers, invoices, receipts, bank statements and journey books	Current academic year, plus six years	Securely disposed of

School meals		
Free school meals registers	Current academic year, plus six years	Securely disposed of
School meals registers	Current academic year, plus three years	Securely disposed of
School meals summary sheets	Current academic year, plus three years	Securely disposed of

8) Retention of other school records

- a) The table below outlines the school's retention periods for any other records held by the school, and the action that will be taken after the retention period, in line with any requirements.
- b) Electronic copies of any information and files will also be destroyed in line with the retention periods below.

Type of file	Retention period	Action taken after retention period ends
Property management		
Title deeds of properties belonging to the school	Permanent	Transferred to new owners if the building is leased or sold

Plans of property belonging to the school	For as long as the building belongs to the school	Transferred to new owners if the building is leased or sold
Leases of property leased by or to the school	Expiry of lease, plus six years	Securely disposed of
Records relating to the letting of school premises	Current financial year, plus six years	Securely disposed of

Maintenance		
All records relating to the maintenance of the school carried out by contractors	Current academic year, plus six years	Securely disposed of
All records relating to the maintenance of the school carried out by school employees	Current academic year, plus six years	Securely disposed of

Operational administration		
General file series	Current academic year, plus five years	Reviewed and securely disposed of
Records relating to the creation and publication of the school brochure and/or prospectus	Current academic year, plus three years	Disposed of against common standards
Records relating to the creation and distribution of circulars to staff, parents or pupils	Current academic year, plus one year	Disposed of against common standards
Newsletters and other items with short operational use	Current academic year plus one year	Disposed of against common standards
Visitors' books and signing-in sheets	Current academic year, plus six years	Reviewed then securely disposed of
Records relating to the creation and management of parent-teacher associations and/or old pupil associations	Current academic year, plus six years	Reviewed then securely disposed of

9) Identifying information

- a) Under the GDPR, all individuals have the right to data minimisation and data protection by design and default – as the data controller, the school ensures appropriate measures are in place in order for individuals to exercise this right.
- b) Wherever possible, the school uses pseudonymisation, also known as the 'blurring technique', to reduce risk of identification.

- c) Where data is required to be retained over time, e.g. attendance data, the school removes any personal data not required and keeps only the data needed – in this example, the statistics of attendance rather than personal information.

10) Storing and protecting information

- a) Our GDPR Data Protection Policy clearly outlines the measures taken to store and protect data.

11) Accessing information

- a) Grimoldby Primary School is transparent with data subjects, the information we hold and how it can be accessed.
- b) All members of staff, parents of registered pupils and other users of the school, e.g. visitors and third-party clubs, are entitled to:
 - Know what information the school holds and processes about them or their child and why.
 - Understand how to gain access to it.
 - Understand how to provide and withdraw consent to information being held.
 - Understand what the school is doing to comply with its obligations under the GDPR.
- c) All members of staff, parents of registered pupils and other users of the school and its facilities have the right, under the GDPR, to access certain personal data being held about them or their child.
- d) The school will adhere to the provisions outlined in the school's Data Protection Policy when responding to requests seeking access to personal information.

12) Digital continuity statement

- a) Digital data that is retained for longer than six years will be named as part of a digital continuity statement.
- b) The DPO will identify any digital data that will need to be named as part of a digital continuity statement.
- c) The data will be archived to dedicated files on the school's server, which are password-protected – this will be backed-up in accordance with section 11 of this policy.
- d) Memory sticks will never be used to store digital data, subject to a digital continuity statement.
- e) The following information will be included within the digital continuity statement:
 - A statement of purpose and requirements for keeping the records
 - The names of the individuals responsible for long term data preservation
 - A description of the information assets to be covered by the digital preservation statement
 - A description of when the record needs to be captured into the approved file formats
 - A description of the appropriate supported file formats for long-term preservation
 - A description of the retention of all software specification information and licence information
 - A description of how access to the information asset register is to be managed in accordance with the GDPR

13) Disposal of data

- a) Where disposal of information is outlined as standard disposal, this will be recycled appropriate to the form of the information, e.g. paper recycling, electronic recycling.
- b) Where disposal of information is outlined as secure disposal, this will be shredded and electronic information will be scrubbed clean and, where possible, cut.
- c) Where the disposal action is indicated as reviewed before it is disposed, the DPO will review the information against its administrative value – if the information should be kept for administrative value, the DPO will keep a record of this.
- d) If, after the review, it is determined that the data should be disposed of, it will be destroyed in accordance with the disposal action outlined in this policy.
- e) Where information has been kept for administrative purposes, the DPO will review the information again after three years and conduct the same process. If it needs to be destroyed, it will be destroyed in accordance with the disposal action outlined in this policy. If any information is kept, the information will be reviewed every three subsequent years.
- f) Where information must be kept permanently, this information is exempt from the normal review procedures.