

TOP 10 KEY RETENTION PERIODS FOR SCHOOLS

Key Guidance for Schools & Trusts

A practical overview for schools and academy trusts to support good records management, information governance and UK GDPR accountability.



RETENTION PERIODS AT A GLANCE

Pupil Records (Primary)

Retain until the pupil transfers to another school

Ensures continuity of education and safeguarding information.

Pupil Records (Secondary)

Retain for 25 years from date of birth

Supports safeguarding, legal and future information requirements.

Child Protection Records

Retain for 25 years from date of birth, or longer if an ongoing issue exists

Supports statutory safeguarding duties and future investigations.

WHAT GOOD LOOKS LIKE

- 01 Retention schedule approved and used.
- 02 Secure disposal is evidenced.
- 03 Records are transferred safely.
- 04 Staff know where to seek advice.

Special Educational Needs (SEN) Files

Retain for 25 years from date of birth

Supports future provision, legal challenge and continuity of support.

Education, Health and Care Plans (EHCPs)

Retain for 25 years from date of birth, or until ceased/replaced plus 6 years

Highly sensitive records requiring careful secure transfer and review.

Staff Personnel Files

Retain for 6 years after employment ends

Supports employment records, references and legal claims.

Payroll, Pensions and Salary Records

Retain for 6 years financial / 12 years pension

Supports HMRC, pension scheme and audit requirements.

Recruitment Records – Unsuccessful Candidates

Retain for 6 months after decision

Helps manage Equality Act and discrimination claim risks.

Accident / Incident Reports – Pupils

Retain for 25 years from date of birth

Covers potential child injury claims and safeguarding context.

Accident / Incident Reports – Staff / Adults

Retain for 6 years after the incident

Supports compliance, liability and insurance evidence.

REMEMBER

Retention periods should be applied consistently, but schools must also consider safeguarding, legal holds, complaints, insurance claims and statutory obligations before disposing of records.

PRACTICAL GUIDANCE

Good retention practice means knowing what you hold, why you hold it, how long it should be kept, and how it will be securely transferred or destroyed.



1

PRACTICAL GUIDANCE



- Use an agreed retention schedule.
- Apply retention periods consistently.
- Record disposal decisions.



Evidence every decision.

2

COMMON MISTAKES



- Keeping duplicate old copies.
- Destroying safeguarding records early.
- No evidence of secure disposal.



Avoid preventable risk.

3

GOOD PRACTICE



- Review records annually.
- Use secure transfer methods.
- Train staff on retention rules.



Build accountability.

THE 5 KEY ACTIONS



1

IDENTIFY

Know what record is held.



2

CLASSIFY

Match record type to schedule.



3

APPLY

Use the correct retention period.



4

DISPOSE

Destroy securely when due.



5

REVIEW

Update practice regularly.

SELF-ASSESSMENT CHECKLIST

	Yes	No	N/A
Retention schedule is approved and accessible.	☐	☐	☐
Records are classified correctly.	☐	☐	☐
Secure disposal is recorded.	☐	☐	☐
Transfers are completed securely.	☐	☐	☐
Exceptions and legal holds are documented.	☐	☐	☐
Staff understand retention responsibilities.	☐	☐	☐

EHCP RETENTION NOTES



EHCPs contain sensitive education, health and care information.



Current plans should transfer securely when a pupil moves school.



Where a plan ceases or is replaced, keep evidence for at least 6 years.



Best practice may be up to 25 years from birth for safeguarding continuity



SBS Resources

Date retention templates and GDPR support.

