



Data Retention and Storage Policy

This policy, which applies to the whole school, inclusive of boarding, is publicly available on the school website and upon request a copy (which can be made available in large print or other accessible format if required) may be obtained from the School Office.

Owner: Director of Finance and Operations

Approving Body: Board of Governors

Date of last Review: February 2026

Date of next Review: February 2027

Linked Policies, Procedures and Resource Materials:

- Safeguarding and Child Protection Policy
- Privacy Notice – Students, Parents and Alumni
- Privacy Notice – Staff
- Privacy Notice – Job Applicants
- Data Protection Policy

AIMS

Woldingham School seeks to balance the benefits of keeping detailed and complete records, for the purposes of good practice, archives or general reference, with practical considerations of storage, space and accessibility. There are legal considerations in respect of retention of records and documents which must be borne in mind by all staff.

These include:

- statutory duties and government guidance relating to schools, including e.g. KCSIE;
- disclosure and evidence requirements for potential future litigation;
- contractual and insurance obligations;
- the laws of confidentiality and privacy; and (last but by no means least relevant)
- GDPR and the DPA, which enshrines it in UK law.

All aspects of Data Protection are covered by Woldingham Schools Data Protection Policy and UK law, the Data Protection Act 2018 [DPA].

DATA STORAGE

Information and records relating to students, parents and staff will be stored securely and will only be accessible to authorised school staff. Information will be stored for only as long as it is needed or required statute and will be disposed of appropriately. See Appendix 1 for school guidelines.

It is Woldingham School's responsibility, through the Director of IT, to ensure all personal and school data is non-recoverable from any computer system previously used within the organisation, which has been passed on/sold to a third party.

CHILD PROTECTION AND DOCUMENT RETENTION

In the light of the Independent Inquiry into Child Sexual Abuse and various high-profile safeguarding cases, all independent schools are aware of the emphasis currently being placed on long-term, lifetime or even indefinite keeping of full records related to incident reporting. Regardless of suggested retention timescales set out below, Woldingham School has extended this rule to any and / or all personnel and student files on a 'safety first' basis. These guidelines have been drafted in full awareness of these considerations. Data protection issues should never put child safety at risk, nor take precedence over the general prevention and processing of safeguarding.

MEANING OF "RECORD"

In these guidelines, "record" means any document or item of data which contains evidence or information relating to the school, its staff or students. Some of this material, but not all, will contain personal data of individuals as defined in the GDPR.

Many new and recent records will be created, received and stored electronically. Others (such as Certificates, Registers, or older records) will be original paper documents. The format of the record is less important than its contents and the purpose for keeping it.

Both paper and digital records will be stored securely and all appropriate measures taken to ensure the security of the data at all times.

PERSONAL AND SPECIAL CATEGORY DATA

Some records will contain information about individuals e.g. staff, students, consultants, parents, contractors - or indeed other individuals, whether they are a part of the school or some other third party (for example, another school). That type of information is likely to amount to "personal data" or "special category data" for the purposes of the DPA and therefore be subject to data protection law which can override school policy in the case of any conflict with aspects of these guidelines.

As a general rule, statutory legal duties and safeguarding requirements will override data protection concerns in the event of any contradiction. Certain personal data may legitimately need to be retained or disclosed subject to a private contractual duty (e.g. under a parent contract).

SECURE DISPOSAL OF DOCUMENTS

When data is to be destroyed, this may be carried out by an appropriately licenced third party. For confidential, sensitive or personal information to be considered securely disposed of, it must be in a condition where it cannot either be read or reconstructed. Skips and 'regular' waste disposal will not be considered secure.

Paper records will be shredded using a cross-cutting shredder; CDs / DVDs / memory sticks will be cut into pieces. Hard-copy images, AV recordings and hard disks will be dismantled and destroyed or have a certificate of data destruction provided. Where third party disposal experts are used they will be subject to adequate contractual obligations to the school to process and dispose of the information confidentially and securely.

LITIGATION

The school will be well placed to deal with claims if it has a strong corporate memory - including adequate records to support its position, or a decision that was made.

Records are not to be disposed of until the limitation period for bringing a claim has passed. For most contracts that will mean 6 years from any breach (or 12 years in case of, say, a witnessed deed), but the date to start counting from is the last day of the period under contract. Where there has been early termination, this will be the relevant date to apply (once the appeal process has been concluded): but for students, limitation periods will only apply from the age of 18 years.

The period of 6 years also applies to many claims outside contract (such as fraud, mistake or negligence). In the case of personal injury it is only 3 years. However, if the harm is only discovered later - e.g. 'latent' damage, or some unseen injury - then the timer only starts from the point of discovery: subject, in the case of latent property damage, to a 15-year backstop.

The most important steps Woldingham School takes to support its policy are:

- having adequate notices and consents in both staff and parent contracts;
- ensuring any long-term records worth keeping are kept very secure, accessible only by trained staff on a need-to-know basis. Insurance documents need to be kept in respect of historic policies for as long as a claim might arise.

RECORDING INFORMATION

It is important that all staff bear in mind, when creating documents and records of any sort (and particularly email), that at some point in the future those documents and records could be disclosed - whether as a result of litigation or investigation, or because of a subject access request under the DPA. **The watchwords of record-keeping are therefore accuracy, clarity, professionalism and objectivity.**

Appendices:

1. Woldingham School Document Retention Periods.
2. Woldingham School Exam Centre Requirements.

APPENDIX 1 - TABLE OF WOLDINGHAM SCHOOL RETENTION PERIODS

The timescales below are given as a guide for minimum retention periods. Figures given are not intended as a substitute to exercising thought and judgment, or taking specific advice, depending on the circumstances. The Director of Finance and Operations [DFO] should be consulted to clarify any issues.

The essence of this guidance can be boiled down to the necessity of exercising thought and judgment –practical considerations mean that case-by-case 'pruning' of records may be impossible. It is therefore accepted that sometimes a more systemic or broad-brush approach is necessary.

Type of Record/Document	Retention Period	Lead:
EMAILS ON SERVER		
Student email account	Delete upon leaving school, or within 1 year	Director of IT
Staff emails and account	Routine deletion of historic emails after 3 years Delete account within 1 year of leaving school	Director of IT
SCHOOL-SPECIFIC RECORDS		
Registration documents of School	Permanent (or until closure of the school)	Director of External Relations / Registrar
Attendance Register	6 years from last date of entry, then archive.	Deputy Head, Pastoral
Minutes of Governors' meetings	6 years from date of meeting	DFO
Annual curriculum	From end of year: 3 years (or 1 year for other class records: e.g. marks / timetables / assignments)	Deputy Head Academic
INDIVIDUAL STUDENT RECORDS		
Admissions: application forms, assessments, records of decisions	25 years from date of birth (or up to 7 years from the pupil leaving). If unsuccessful: up to 1 year	Director of External Relations / Registrar
Examination results (external or internal)	7 years from pupil leaving school	Deputy Head, Academic /

		Exams Officer
Student file including: <ul style="list-style-type: none"> ○ Student reports ○ Student performance records ○ Students medical records/record of accidents 	ALL: 25 years from date of birth (<i>subject where relevant to any material that may be relevant to potential historic claims: see below</i>).	Director of External Relations / Registrar
Special educational needs records (<i>to be risk assessed individually</i>)	Date of birth plus up to 35 years	Deputy Head Academic / SEN HoD
Student immigration records	Duration of student sponsorship plus min 1 year	Director of External Relations / Registrar
SAFEGUARDING		
Policies, procedures and insurance	Permanent record of historic policies	DFO
DBS disclosure certificates	<u>No longer than 6 months</u> from decision on recruitment, unless police specifically consulted. A record of the checks being made must be kept on SCR / personnel file, but not the certificate itself	Head of HR
Accident / Incident reporting	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.	DFO
Child Protection files and specific records of child sexual abuse	If a referral has been made / social care have been involved / child has been subject of a multi-agency plan; or if any risk of future claim(s): 75 years	Deputy Head, Safeguarding
Video recordings of meetings	Where any one-on-one meetings of classes, counselling, or application interviews are recorded (e.g. for safeguarding purposes), a shorter-term retention policy is acceptable	Deputy Head, Safeguarding

	based on the DSL's view of how quickly a concern will likely be raised: e.g. 3-6 months or immediately upon DSL review	
ACCOUNTING RECORDS		
Accounting records	Minimum – 6 years from the end of the financial year in which the transaction took place	Head of Finance
Tax and VAT returns	Minimum – 6 years	Head of Finance
Budget and internal financial reports	Minimum - 3 years	Head of Finance
INTELLECTUAL PROPERTY RECORDS		
Formal documents of title (trade mark or registered design certificates; patent or utility model certificates)	Permanent (in the case of any right which can be permanently extended, e.g. trade marks); otherwise expiry of right plus minimum of 7 years	DFO
EMPLOYEE / PERSONNEL RECORDS		
Single Central Record of employees	Keep a permanent record that mandatory checks have been undertaken (but do <u>not</u> keep DBS certificate information itself: 6 months as above)	Head of HR
Contracts of employment	7 years from effective date of end of contract	Head of HR
Employee appraisals or reviews	Duration of employment plus minimum of 7 years	Head of HR
Staff personnel file	Duration of employment plus minimum of 7 years , but <u>do not delete any information which may be relevant to historic safeguarding claims</u>	Head of HR
Payroll, salary, maternity pay records	Minimum – 6 years	Head of Finance
Pension or other benefit schedule records	Potentially permanent (ie lifetimes of those involved), depending on nature of scheme	Head of Finance

Unsuccessful job applicant - interview & rejection records	12 months (<i>NB – ACAS has extended the early conciliation period to 12 weeks from 1 December 2025 and there are also proposals to extend the time limit for bringing a tribunal claim from 3 to 6 months). [In respect of DBS certificates and records of criminal information disclosed by the candidate (if applicable), see DBS section in 'Safeguarding' above.]</i>	Head of HR
Staff immigration records (Right to work, etc.)	Minimum – 2 years from end of employment	Head of HR
Tier 2 migrant worker sponsor records	Minimum – 1 year from end of employment	Head of HR
Health records relating to employees	7 years from end of employment	Head of HR
Records of low-level concerns about adults	At least until end of employment (as recommended by KCSIE), then subject to review for relevance: e.g. 7 years from end of employment if they have ongoing relevance for employment claims, longer if necessary for safeguarding purposes / claims.	Head / Head's EA
CONTRACTS AND AGREEMENTS		
Signed or final/concluded agreements (plus any signed or final/concluded variations or amendments)	Minimum – 7 years from completion of contractual obligations or term of agreement, whichever is the later	DFO
Deeds (or contracts under seal)	Minimum – 13 years from completion of contractual obligation or term of agreement	DFO
INSURANCE RECORDS		
Insurance policies (will vary - private, public, professional indemnity)	Duration of policy (or as required by policy). Ideally, until it is possible to calculate that no living person could make a claim.	DFO
Correspondence related to claims/ renewals/ notification re: insurance	Minimum - 7 years (<i>but this will depend on what the policy covers and whether e.g. historic claims may still be made</i>)	DFO

ENVIRONMENTAL & HEALTH RECORDS		
Maintenance logs	10 years from date of last entry	Director of Estates
Accidents to children	25 years from birth (longer for safeguarding)	DFO / Director of Estates
Accident at work records (staff)	Minimum - 4 years	DFO
Staff use of hazardous substances	Minimum 7 years from end of date use	Director of Estates
Risk assessments (carried out in respect of above)	Minimum - 7 years from end of date of use 7 years from completion of relevant project, incident, event or activity.	Director of Estates
Art.30 UK GDPR records of processing activity (ROPAs), data breach records, data protection impact assessments	No limit (as long as no personal data held), but must be kept up-to-date, accurate and relevant.	DFO
CORPORATE RECORDS		
Certificates of Incorporation	Permanent (or until dissolution of the company)	DFO
Minutes, Notes and Resolutions of Boards or Management Meetings	Minimum – 10 years	DFO
Shareholder resolutions	Minimum – 10 years	DFO
Register of Members/Shareholders	Permanent (minimum 10 years for ex members/shareholders)	DFO
Annual reports	Minimum – 6 years	DFO

APPENDIX 2 - WOLDINGHAM SCHOOL EXAM CENTRE REQUIREMENTS

As an Approved Exam Centre, Woldingham School follows the General Regulations from the Joint Council for Qualifications (JCQ). This requires all candidates to sign a Data Protection Notice to acknowledge the use of the following personal data by Woldingham School and the exchange of personal data with various exam boards relating to exam entries.

- a. Personal data relating to the name(s), date of birth, gender, unique candidate identifier (UCI) and unique learner number (ULN) of an individual candidate will always be collected by an awarding body for the purposes of examining and awarding qualifications. In some cases, additional information, which may include sensitive personal data relating to health, will also be collected to support requests for access arrangements and reasonable adjustments and/or special consideration. Such personal data will be supplemented by the results of examinations and assessments undertaken by the respective candidate.
- b. A candidate's personal data will only be collected from registered examination centres in the context of examination entries and/or certification claims.
- c. Such data collected will not be used by an awarding body other than for the administration of the examinations process, conducting assessments and the certification of results claims.
- d. Personal data within candidates' work will be collected and processed by an awarding body for the purposes of marking, issuing of examination results and providing candidates with access to post-results services. Examination results will be retained for a minimum of forty years.
- e. In order for an awarding body to achieve this, some personal information may be transferred to third parties such as examiners, who may in some instances, reside outside the European Economic Area.
- f. Awarding bodies may be required to provide a candidate's personal data to educational agencies such as DfE, WG, DENI, The Skills Funding Agency, Ofqual, HESA, UCAS, Local Authorities, EFA and Learning Records Service (LRS). Additionally, candidates' personal data may be provided to a central record of qualifications approved by the awarding bodies for statistical and policy development purposes.⁶ Some of the information candidates supply will be used by the Skills Funding Agency to fulfil its statutory functions, issue/verify a candidate's Unique Learner Number (ULN) and update/check a candidate's Personal Learning Record.
- g. The Skills Funding Agency may share a candidate's ULN and Personal Learning Record with other education related organisations, such as a careers service, a candidate's school or college, Government Departments and public bodies responsible for education. Further details of how information is processed and shared can be found at: <http://www.learningrecordsservice.org.uk/>
- h. Awarding bodies are obliged to confirm what personal data is held, what it is held for, to whom the data are to/may be disclosed, and disclose the information that they hold about data subjects, (e.g. the candidates) within 40 days of receiving a formal request for disclosure, subject to the application of any relevant exemptions under the Data Protection Act 1998.