



Retention and Records Management Guide

A number of laws and regulations that concern Data Protection and Freedom of Information governs the management of records.

Record Management is the practice of maintaining records from the time they are created until their disposal.

It is primarily concerned with the retention of records produced from the School business activities.

What is a record?

A Record is any information created, received, and maintained as evidence and information by the Council and its employees, in pursuance of its legal obligations or business transactions - *regardless of format*

Retention is based on statutory requirements and the record's ongoing value. The Schedule is constantly under review and subject to adaptation depending on legislation and operational procedures.

Records can come in many forms, such as;

- Paper documents
- Physical objects
- Digital records (i.e. customer records, birth certificates, office documents, prosecution evidence, electronic systems and emails)

The creation, maintenance and destruction of records are the responsibility of the individual school.

It is essential that all records are stored securely and the location of files is up to date at all times.

Information Management Schools Toolkit

The Information Management Toolkit for Schools, available on SLA Online, is a dynamic document that sets out the periods for which records should be retained.

The Schedule provides clear direction as to:





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- when the retention period begins on each record type;
- What retention period applies to each record type;
- What disposal measures must be taken when each record type reaches the end of its retention period.

The Retention Schedule applies to all record types, irrespective of the format in which they are created or held.

Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437 As amended by SI 2018 No 688		
Primary		Retain whilst the child remains at the primary school	The file should follow the pupil when he/she leaves the primary school. This will include: <ul style="list-style-type: none"> • To another primary school • To a secondary school • To a pupil referral unit
Secondary	Limitation Act 1980 (Section 2)	Date of birth of the pupil + 25 years	REVIEW
Examination Results – pupil copies			





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Public		This information should be added to the pupil file	All uncollected certificates should be returned to the examination board after reasonable attempts to contact the pupil have failed
Internal		This information should be added to the pupil file	

For more information please visit the SLA website.

Glamorgan Archives

Glamorgan Archives staff are pleased to provide advice and guidance on the types of historic records, which an archive repository would seek to collect. Our archivists are happy to appraise records in order to decide whether or not they are worthy of permanent preservation.

Please do not hesitate to contact for further advice on these issues.

Glamorgan Archives

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Leckwith

Cardiff

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Website: www.glamarchives.gov.uk



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Working for Cardiff, working together