



RADLEY

**Records Retention Schedule
Guidelines**

January 2024

These have been adapted from guidelines designed for maintained schools in *School Records: their management and retention* Society of Archivists Records Management Group, 1995.

Several professions within the school also have their own guidelines drawn up by their respective professional bodies. These need to be incorporated.

The main purpose of this document is

- to identify records within the school which should or should not be retained within the school Archive
- to formalise length of retention
- to establish access restrictions
- to preserve the school's records
- to identify the officers responsible as originators
- to ensure material is compliant with GDPR legislation

Areas covered:

- 1. Governance & Management/ Council, Warden, SMT & Tutors**
- 2. School organisation/ Warden, Admissions, Academic, Boarding**
- 3. Pupil records/ Academic, Admissions, Pastoral, Exams, Radleian Society**
- 4. Inspection/ Boarding & Academic**
- 5. Health & Safety/ Medical Centre**
- 6. Personnel**
- 7. Finance**
- 8. Estate/ Grounds, Gardens, Housekeeping, Maintenance, Buildings, Reprographics**
- 9. Extra-curricular and miscellaneous activities/ Sports (including Boat house & Countryside Centre), Theatre, Music, Publications, Photographs**

Governance & Management/ Council, Warden, SMT & Tutors

Retention schedules

C = current year + additional time after no longer current

A = active file

T = transfer to Archives after C+n

P = permanent retention in Archives

R = review retention

D = delete after C+n

S = retain sample

Restricted = access to this file will be determined by the status of the material to be consulted, or by the status of the individual seeking access. Some files will be closed for a pre-determined length of time eg. 10 years from deposit, or death of subject

Record series	Active	Archives	Access	Originator	Notes	Confirmed
Minutes and reports of management team meetings (SMT)	C+3	R	restricted	SMT/Warden's PA	consider length of time before release	
Tutors meetings	C	T + P	unrestricted	Warden/Warden's PA	Archives to collect on publication	
School development plans	C+3	T + P	unrestricted	Warden/SMT	Archives to collect on publication	
Warden's personal filing	C+6	R	restricted	Warden/Warden's PA	review on retirement	
Sub-Warden's/Senior Masters personal files	C+6	R	restricted	Sub-Warden/SMT	review on retirement	
Council minutes (to include working parties etc)	C+6	R	restricted	Bursar	consider length of time before release	
Council correspondence	C +3	R	restricted	Bursar	consider length of time before release	

School organisation/ Warden, Admissions, Academic, Boarding

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Record series	Active	Archives	Access	Originator	Notes	Confirmed
School prospectus	C+1	T + P	unrestricted	Admissions	Pass to Archives on publication	
Warden's official diary (if kept)	C+1	T + P	unrestricted	Warden's PA	T + P use as record of events if no log book	
Annual calendar	C	T + P	unrestricted	SMT	deposit in Archives on publication	
Newsletter to parents	C	T + P	unrestricted	Warden	keep all as summary of events, deposit on publication	
Dons handbook	C	T + P	unrestricted	SMT	consider retaining sample not all	
Common Room records	C+3	T + P	restricted	President of CR		
Heads of Departments books (Academic)	A	T + R	unrestricted	Academic Director	consider retaining sample	
Policy documents	A	T + R	unrestricted	SMT	Consider retaining sample	

Pupil records/ Academic, Admissions, Pastoral, Exams, Radleian Society

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Need to incorporate GDPR and Child Welfare legislation

Record series	Active	Archives	Access	Originator	Notes	Confirmed
Admission registers/ Grey book	A	T + P	restricted	SMT + Admissions	consider data protection issues & born digital content	
Pupil record cards/Grey book/ Schoolbase records	C+6	T + P	restricted	SMT + Tutors	consider data protection issues & born digital content	
Punishment books/Schoolbase records	C	T + P	restricted	SMT + Tutors	HIGHLY SENSITIVE now electronic, consider retention issues, data protection	
Exam records	C+30	R	restricted	Exams Officer	Property of the individual	
Tutors files	T	T+P	restricted	Tutors	initially sent to Radleian Society, transfer to Archives after death. Confirmed 2017 no weeding	
SEND files	C+6	T+P	restricted	Head of SEND	Sensitive data	
Tutors/Social logbooks	C+6	T + P	restricted	Tutors	Sensitive data	
Old Boy files	A	T + P	restricted	Radleian Society	Files passed to Archives upon death of an OR	

Inspection/ Boarding & Academic

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Final inspection report (Academic)	C+6	T + P	unrestricted	SMT	deposit in Archives on publication	
Final inspection report (Boarding)	C+6	T + P	unrestricted	Sub-Warden	deposit in Archives on publication	

Health & Safety/ Medical Centre

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Need to incorporate existing external professional guidelines

Record series	Active	Archives	Access	Originator	Notes	Confirmed
Health & safety policy statement	C+1	D	unrestricted	Safety Officer		
Accident books	C+3	D	restricted	Safety Officer		
Safety incident report books	C+20	D	restricted	Safety Officer		
Health surveillance records	C+30		restricted	Medical Centre		
Records of reportable injuries etc	C+10		restricted	Medical Centre		
Record of reportable diseases	C+10		restricted	Medical Centre		
Risk assessments	C+10	T	restricted	Safety Officer	review & keep sample	
Risk control measures records	C+10	T	restricted	Safety Officer	review & keep sample	
Maintenance log book	C+10	D	restricted	Maintenance/Estates Bursar		
Training records	C+10	D	restricted	Maintenance/Estates Bursar		
Health & safety reports	C+6	T + P	restricted	Safety Officer	deposit in Archives on publication	
Fire precautions log book	C+6	D	restricted	Safety Officer		

Personnel

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Need to incorporate existing external professional guidelines, especially Data Protection legislation

Record series	Active	Archives	Access	Originator	Notes	Confirmed
Personal professional development plans (drawn from MOTs?)	C+3	T + P	restricted	Warden/HR	consider length of time before release	
Teachers' files	C+12	S + P	restricted	HR	consider length of restriction, maintain sample only eg. long-service personnel?	
Non-academic staff	C+12	S + P	restricted	HR	consider sample by length of service, and post?	
Personnel database	A	S + P	restricted	HR	snapshots to record names, job titles, length of service	

Finance

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Need to incorporate existing external professional guidelines

Record series	Active	Archives	Access	Originator	Notes	Confirmed
Annual budget report	C+6	T + P	restricted	Bursar/Finance Bursar	Access is currently restricted to Trustees, the Warden & Bursar	
Budget files	C+6	D	restricted	Bursar/ Finance Bursar	To be kept by Finance Bursar for 3 years	
Annual statement of account	C+6	T + P	unrestricted	Bursar/Finance Bursar	This is published to the Charity Commission and must be kept permanently.	
Order books and requisitions	C+6	D	restricted	Bursar/ Finance Bursar	Sensitivity of certain information; to be kept for 7 years for HMRC purposes.	
Delivery documentation	C+6	D	restricted	Bursar /Finance Bursar	Sensitivity of certain information; to be kept in departments for 7 years.	
Invoices	C+6	D	restricted	Bursar/ Finance Bursar	Sensitivity of certain information; to be kept in finance archives for 7 years for HMRC purposes.	
Bank account records	C+6	D	restricted	Bursar/ Finance Bursar	Sensitivity of certain information; to be kept in finance archives for 7 years for HMRC purposes	
Cashbooks	C+6	D	restricted	Finance Bursar	Sensitivity of certain information; to be kept in finance archives for 7 years for HMRC purposes	
Shop accounts	A	D	restricted	Bursar/Shop Manager	Sensitivity of certain information; to be kept in finance archives for 7 years for HMRC purposes	

Estate/ Grounds, Gardens, Housekeeping, Maintenance, Buildings, Reprographics

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Legal agreements, leases, maintenance Contracts	Termination+6			Bursar/Estates Bursar		
Register of contracts	C+6	T + P	unrestricted	Bursar/Estates Bursar	a useful record of development of the school	
Register of tenders & quotations	C+6		restricted	Bursar/Estates Bursar	retain for audit	
Orders for repairs, maintenance, supplies	C+6		restricted	Bursar/Estates Bursar		
Records of insurance	C					
Title deeds	C	T + P	restricted		non-current deeds and original deeds to property should be passed to Archives, or kept in bank with a register kept in Archives	
Maintenance log books	C+6			Bursar/Estates Bursar		
Contractors reports	C+6			Bursar/Estates Bursar		
Inventories of furniture and equipment	C	S + P	restricted	Bursar/Estates Bursar/ Housekeeper	detailed inventories & provenance info should be copied to Archives, especially for historic items	

Plans & Maps	A	T + R	restricted	Estates Bursar	Samples of building plans, including unbuilt contracts, and all historic plans to Archives	
Planting records	A	T + R	unrestricted	Estates Bursar/Head Groundsman/Head Gardener	Valuable record of a historic landscape	
Reprographics commissions	A	T + S	unrestricted	SMT/Reprographics Officer	Samples of work are often the only opportunity to add some items to the Archives as a record of events	

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School magazines	C	T + P	unrestricted	editors	All sent immediately on publication. Beware copyright & born-digital content	
Scrapbooks	C+1	T + P	unrestricted	various	Beware copyright	
Photographs	C	T + R	unrestricted		Beware copyright & born-digital content, and parental consent forms	
Programmes	C+1	T + P	unrestricted	various		
School societies – minute & log books	C	R + P	unrestricted	various		