

The Oak Trust

Data Retention & Destruction Policy



Data Retention and Destruction Policy

Under the Freedom of Information Act 2000, schools, including Academies and Multi-Academy Trusts, are required to maintain a retention schedule listing the records which the school creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

Members of staff are expected to manage their current records using the retention schedule and to take account of the different kinds of retention periods when they are creating new records.

The retention schedule refers to all information, regardless of the media in which it is stored.

There are a number of benefits which arise from the use of a complete retention schedule:

- Managing records against the retention schedule is deemed to be “normal processing” under the General Data Protection Regulation 2018 and the Freedom of Information Act 2000. Members of staff should be aware that once a Freedom of Information request is received or a legal hold imposed then records disposal relating to the request or legal hold must be stopped.
- Members of staff can be confident about safe disposal at the appropriate time.
- Information which is subject to Freedom of Information and Data Protection legislation will be available when required.
- The school is not maintaining and storing information unnecessarily.

Destruction of Records

Where records have been identified for destruction they should be disposed of in an appropriate way. All records containing personal information, or sensitive policy information should be disposed of using the confidential waste sacks provided. Do not put these records in the dustbin or skip.

The Freedom of Information Act 2000 requires the school maintain a list of records which have been destroyed and who authorised their destruction.

Members of staff should record at least:

- File reference number (or other unique identifier)
- File title (or brief description) and number of files
- The name of the authorising officer and the data action taken

A database will be maintained for this purpose.

Responsibilities

All staff are responsible for maintaining the records required by Statutory Regulations and those required for the management of the School. In addition all staff are responsible for managing the records for which they are responsible in accordance with this Policy including destroying or archiving as appropriate.

Retention Guidelines

Some of the retention periods are governed by statute, others are guidelines following best practice. Every effort has been made to ensure that these retention periods are compliant with the requirements of the Data Protection Act, GDPR and the Freedom on Information 2000. Managing record series using these retention guidelines will be deemed to be 'normal processing' under the legislation mentioned above. If records series are to be kept for longer or shorter periods than laid out in this document the reasons for this need to be documented.

Child Protection					
Due to the on-going Independent Inquiry into Child Sexual Abuse (IICSA/Jay Inquiry) records relating to child protection matters concerning pupils, and child protection allegations against staff should not be destroyed until further notice.					
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record	
Child Protection files	Yes	“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	DO NOT DESTROY (Future use Date of leaving + 25years)	SECURE DISPOSAL – these records must be shredded	Child Protection information must be copied and sent under separate cover to new school/college whilst the child is still under 18 (the information does not need to be sent to a university) Where a child is removed from roll to be educated at home, the file should be copied to the Local Authority.
Allegation of a child protection nature against a member of staff, including where the allegation is unfounded	Yes	“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	DO NOT DESTROY (Future use until the person’s normal retirement age, or 10 years from the date of the allegation whichever is the longer)	SECURE DISPOSAL – these records must be shredded	The following is an extract from “Safeguarding Children and Safer Recruitment in Education” p60: “Record Keeping 5.10 It is important that a clear and comprehensive summary of any allegations made, details of how the allegation was followed up and resolved, and a note of any action taken and decision reached, is kept on a person’s confidential personnel file, and a copy provided to the person concerned. The purpose of the record is to enable accurate information to be given in response to any future request for a reference if the person has moved on. It will provide clarification in cases where a future DBS Disclosure reveals information from the police about an allegation that did not result in a criminal conviction. And it will help to prevent unnecessary reinvestigation if, as sometimes happens, an allegation re-surfaces after a period of time. The records should be retained at least until the person has reached normal retirement age or for a period of 10 years from the date of the allegation if that is longer”

Management of the School – Governing Body				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Agendas for Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		One copy should be retained with the master set of minutes. All other copies can be disposed of	SECURE DISPOSAL
Minutes of Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff			
<ul style="list-style-type: none"> • Principle set (signed) 			PERMANENT	
<ul style="list-style-type: none"> • Inspection copies (these are the copies which the clerk to the Governors may wish to retain so that requestors can view all the appropriate information without the clerk needing to print off and collate redacted copies of the minutes each time a request is made) 			Date of meeting + 3 years	If these minutes contain any sensitive, personal information they must be shredded
Reports presented to the Governing Body	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		Reports should be kept for a minimum of 6 years. However, if the minutes refer directly to individual reports then the reports should be kept permanently	SECURE DISPOSAL or retain with signed set of minutes
Meeting papers relating to the annual parents' meeting held under section 33 or the Education Act 2002	No	Education Act 2002, Section 33	Date of the meeting + a minimum of 6 years	SECURE DISPOSAL

Instruments of Government including Articles of Association	No		PERMANENT	Retain in school whilst school is open
Trusts and Endowments managed by the Governing Body	No		PERMANENT	Retain in school whilst school is open
Action plans created and administered by the Governing Body	No		Life of the action plan + 3 years	SECURE DISPOSAL
Policy documents created and administered by the Governing Body	No		Life of the policy + 3 years	SECURE DISPOSAL
Records relating to complaints dealt with by the Governing Body	Yes		Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	SECURE DISPOSAL
Annual Reports created under the requirements of the Education (Governor's Annual Reports)(England) (Amendment) Regulations 2002	No	Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171	Date of report + 10 years	SECURE DISPOSAL
Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies	No		Date of proposal accepted or declined + 3 years	SECURE DISPOSAL

Management of the School - Head Teacher and Senior Management Team				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Log books of activity (books where the Headteacher or another member of staff keeps a record of what happens in the school, this may include details of events, photographs and other information)	There may be data protection issues if the log book refers to individual pupils or members of staff		Date of last entry in the book + a minimum of 6 years then review	These could be of permanent historical value
Minutes of Senior Management Team meeting and the meetings of other internal administrative bodies	There may be data protection issues if the log book refers to individual pupils or members of staff		Date of last meeting + 3 years then review	SECURE DISPOSAL
Reports created by Headteacher or Management Team	There may be data protection issues if the log book refers to individual pupils or members of staff		Date of last meeting + 3 years then review	SECURE DISPOSAL
Records created by Headteacher, other members of the Senior Leadership team, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the log book refers to individual pupils or members of staff		Current academic year + 6 years then review	SECURE DISPOSAL
Correspondence created by Headteacher, other members of the Senior Leadership team, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the log book refers to individual pupils or members of staff		Date of correspondence + 3 years then review	SECURE DISPOSAL
Professional Development Plans	Yes		Life of the plan + 6 years	SECURE DISPOSAL
School Development Plans	No		Life of the plan + 3 years	SECURE DISPOSAL

Management of the School - Admissions Process				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
All records relating to the creation and implementation of the School Admissions Policy	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Life of the policy + 3 years then review	SECURE DISPOSAL
Admissions – if the admission is successful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Date of admission + 1 year	SECURE DISPOSAL
Admissions – if the admission is unsuccessful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Resolution of the case + 1 year	SECURE DISPOSAL
Register of Admissions (these are no longer created in paper format)	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made	REVIEW Schools may wish to consider keeping the admission register permanently as often

				schools receive enquires from past pupils to confirm the dates they attended the school
Admissions – Secondary – Schools – Casual	Yes		Current year + 1 year	SECURE DISPOSAL
Proofs of address supplied by parents as part of the admissions process	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Current year + 1 year	SECURE DISPOSAL
Supplementary information form including additional information such as religion, medical conditions etc	Yes			
<ul style="list-style-type: none"> For successful admissions 			This information should be added to the pupil file	SECURE DISPOSAL
<ul style="list-style-type: none"> For unsuccessful admissions 			Until appeals process completed	SECURE DISPOSAL

Management of the School - Operational Administration				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
General file series	No		Current year + 5 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	STANDARD DISPOSAL
Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	STANDARD DISPOSAL
Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
Visitors books and signing in sheets	Yes		Current year + 6 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 years then REVIEW	SECURE DISPOSAL

HR – Recruitment				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
All records leading up to the appointment of a new Headteacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
All records leading up to the appointment of a new member of staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
All records leading up to the appointment of a new member of staff – successful candidate	Yes		All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	SECURE DISPOSAL
Pre-employment vetting information – DBS checks	No	DBS Update Service Employer Guide June 2014: Keeping children safe in education, July 2015 (Statutory Guidance from Dept of Education)Sections 73, 74	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months	
Proofs of identify collected as part of the process of checking “portable” enhanced DBS disclosure	Yes		Where possible these should be checked and a note kept of what was seen and what has been checked. If is it felt necessary to keep copy documentation then this should be placed on the member of staff’s personal file	

Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	Yes	An employer’s guide to right to work checks (Home Office May 2015)	Where possible these document should be added to the Staff Personal File (see below) but if they are kept separately then the Home Office requires that the documents are kept to termination of Employment plus not less than two years	
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HR – Operational Staff Management				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years	SECURE DISPOSAL
Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
Annual appraisal/assessment records	Yes		Current year + 5 years	SECURE DISPOSAL

HR – Management of Disciplinary and Grievance Process				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Yes	“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	Until the person’s normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note allegations that are found to be malicious should be removed from the personnel files. If found there are to be kept on file and a copy provided to the person concerned	SECURE DISPOSAL These records must be shredded
Disciplinary Proceedings	Yes			
• Oral warning			Date of warning + 6 months	SECURE DISPOSAL (If warnings are placed on personal files then they must be weeded from the file)
• Written warning – level 1			Date of warning + 6 months	
• Written warning – level 2			Date of warning + 12 months	
• Final warning			Date of warning + 18 months	
• Case not found			If the incident is child protection related then see above otherwise dispose of at the conclusion of the case	SECURE DISPOSAL

HR - Health and Safety				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Health and Safety Policy statements	No		Life of policy + 3 years	SECURE DISPOSAL
Health and Safety Risk Assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL
Records relating to accident/injury at work	Yes		Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL
Accident Reporting	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980		
<ul style="list-style-type: none"> Adults 			Date of the incident + 6 years	SECURE DISPOSAL
<ul style="list-style-type: none"> Children 			DOB of the child + 25 years	SECURE DISPOSAL
Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)	Current year + 40 years	SECURE DISPOSAL

Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	No		Last action + 50 years	SECURE DISPOSAL
Fire Precautions log books	No		Current year + 6 years	SECURE DISPOSAL
<i>Incident reports</i>	<i>Yes</i>		<i>DOB of child +25 years</i>	<i>SECURE DISPOSAL</i>
<i>Records of the administration of medicines for all routine medication (eg Calpol, antibiotics etc)</i>	<i>Yes</i>		<i>1 year</i>	
<i>Records of the administration of medicines for all non routine medication (eg peg feeding, epi pen, invasive drugs, anti depressants) and any records governing a reported incident, difficulty or issues with administering medication</i>	<i>Yes</i>		<i>DOB of child +25 years</i>	<i>SECURE DISPOSAL</i>

HR - Payroll and Pensions				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	SECURE DISPOSAL
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL

Financial Management of the School – Risk Management and Insurance				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL
<i>Claims made against insurance policies – damage to property</i>	<i>Yes</i>		<i>Case concluded + 3 years</i>	<i>SECURE DISPOSAL</i>
<i>Claims made against insurance policies – personal injury</i>	<i>Yes</i>		<i>Case concluded + 6 years</i>	<i>SECURE DISPOSAL</i>

Financial Management of the School – Asset Management				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL

Financial Management of the School – Accounts and Statements including Budget Management				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Annual Accounts	No		Current year + 6 years	STANDARD DISPOSAL
Loans and grants managed by the school	No		Date of last payment on the loan +12 years then REVIEW	SECURE DISPOSAL
Student Grant Applications	Yes		Current year + 3 years	SECURE DISPOSAL
All records relating to the creation and management of budgets including the Annual Budget statement and background papers	No		Life of the budget + 3 years	SECURE DISPOSAL
Invoices, receipts, order books and requisitions, delivery notices, <i>petty cash records</i>	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL

Financial Management of the School – Contract Management				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL
Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL

Financial Management of the School – School Fund				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
School Fund – Cheque books	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Paying in books	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Ledger	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Invoices	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Receipts	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Bank statements	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Journey books	No		Current year + 6 years	SECURE DISPOSAL

Financial Management of the School – School Meals Management				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Free schools meals registers	Yes		Current year + 6 years	SECURE DISPOSAL
School meals registers	Yes		Current year + 3 years	SECURE DISPOSAL
School meals summary sheets	No		Current year + 3 years	SECURE DISPOSAL

Property Management				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Title deeds of properties belonging to the school	No		PERMANENT These should follow the property unless the property has been registered with the Land Registry	
Plans of property belonging to the school	No		These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold	
Leases of property leased by or to the school	No		Expiry of lease + 6 years	SECURE DISPOSAL
Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL

Property Management - Maintenance				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
All records relating to the maintenance of the school carried out by school employees including maintenance log books	No		Current year + 6 years	SECURE DISPOSAL

Pupil Management – Pupil Educational Record				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Pupils Educational Record required by The Education (Pupil Information)(England) Regulations 2005	Yes	The Education (Pupil Information)(England) Regulations 2005 SI 2005 No 1437		
<ul style="list-style-type: none"> Primary 			Retain whilst the child remains at the primary school	<p>The file should follow the pupil when he/she leaves the primary school. This will include:</p> <ul style="list-style-type: none"> To another primary school To a secondary school To a pupil referral unit <p>If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period. If the pupil transfers to an independent school, transfers to home schooling or leaves the country the file should be returned to the Local Authority to be retained for the statutory retention period.</p> <p>Primary schools do not ordinarily have sufficient storage space to store records for pupils who have not transferred in the normal way. It makes more sense to transfer the records to the Local Authority as it is more likely that the pupil will request the record from the Local Authority.</p>
<ul style="list-style-type: none"> Secondary 		Limitation Action 1980 (Section 2)	Date of Birth of the pupil + 25 years	SECURE DISPOSAL
Examination Results – Pupil Copies	Yes			
<ul style="list-style-type: none"> Public 			This information should be	All uncollected certificates should be returned to the examination board.

			added to the pupil file	
<ul style="list-style-type: none"> Internal 			This information should be added to the pupil file	
Child Protection information held on pupil file	Yes	“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file	SECURE DISPOSAL – these records must be shredded
Child Protection information held in separate files	Yes	“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare	DOB of the child + 25 years then REVIEW. This retention period was agreed in consultation with the Safeguarding Childrens	SECURE DISPOSAL – these records must be shredded

		of children March 2015”	Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services records	
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Pupil Management – Attendance				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Attendance Registers	Yes	School attendance: Department advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made	SECURE DISPOSAL
Correspondence relating to authorised absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

Pupil Management – Special Educational Needs				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Special Educational Need files, reviews and Individual Education Plans <i>(Secondary)</i>	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	REVIEW NOTE: This retention period is the minimum retention period that any pupil file should be kept. Some authorities choose to keep SEN files for a longer period of time to defend themselves in a “failure to provide a sufficient education” case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented.
<i>Special Educational Need files, reviews and Individual Education Plans (Primary)</i>	<i>Yes</i>	<i>Limitation Act 1980 (Section 2)</i>	<i>Transfer to secondary school</i>	
Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years (this would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold
Advice and information provided to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years (this would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold
Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years (this would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold

Curriculum Management – Statistics and Management Information				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Curriculum returns	No		Current year + 3 years	SECURE DISPOSAL
Examination Results (schools copy)	Yes		Current year + 6 years	SECURE DISPOSAL
SATS record -	Yes			
<ul style="list-style-type: none"> Results 			The SATS results should be recorded on the pupils educational file and will be therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all whole year SATs results. These could be kept for current year + 6 years to allow suitable comparison	SECURE DISPOSAL
<ul style="list-style-type: none"> Examination papers 			The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
Published Admission Number (PAN) Reports	Yes		Current year + 6 years	SECURE DISPOSAL
Value Added and Contextual Data	Yes		Current year + 6 years	SECURE DISPOSAL
Self Evaluation Forms	Yes		Current year + 6 years	SECURE DISPOSAL

Curriculum Management – Implementation and Curriculum				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Schemes of work	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL
Timetable	No		Current year + 1 year	
Class Record books	No		Current year + 1 year	
Mark books	No		Current year + 1 year	
Record of homework set	No		Current year + 1 year	
Pupils work	No		Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the school's current policy then current year + 1 year	SECURE DISPOSAL

Extra Curricular Activities – Educational Visits outside the Classroom				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Records created by the schools to obtain approval to run an Educational Visit outside the Classroom – Primary Schools	No	Outdoor Education Advisers Panel National Guidance website http://oeapng.info specifically Section 3 “Legal Framework and Employer Systems” and Section 4 “Good Practice”	Date of visit + 10 years	SECURE DISPOSAL
Records created by the schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools	No	Outdoor Education Advisers Panel National Guidance website http://oeapng.info specifically Section 3 “Legal Framework and Employer Systems” and Section 4 “Good Practice”	Date of visit + 10 years	SECURE DISPOSAL
Parental consent forms for school trips where there has been no major incident	Yes		Conclusion of the trip	Although the consent forms could be retained for DOB + 22 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issues by the school for this period of time
Parental permission slips for school trips – where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	DOB of the pupil involved in the incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	

Extra Curricular Activities – Walking Bus				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Walking bus registers	Yes		Date of register + 3 years This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report and kept for the period of time required for accident reporting	SECURE DISPOSAL (If these records are retained electronically any back up copies should be destroyed at the same time)

Extra Curricular Activities				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Day books	Yes		Current year + 2 years then review	
Reports for outside agencies – where the report has been included on the case file created by the outside agency	Yes		Whilst the child is attending school and then destroy	
Referral forms	Yes		While the referral is current	
Contact data sheets	Yes		Current year then review, if contact is no longer active then destroy	
Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	
Group registers	Yes		Current year + 2 years	

Central Government and Local Authority – Local Authority				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Secondary Transfer Sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
Attendance Returns	Yes		Current year + 1 year	SECURE DISPOSAL
School Census Returns	No		Current year + 5 years	SECURE DISPOSAL
Circulars and other information sent from the Local Authority	No		Operational use	SECURE DISPOSAL

Central Government and Local Authority – Central Government				
Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL
Circulars and other information sent from central government	No		Operation use	SECURE DISPOSAL