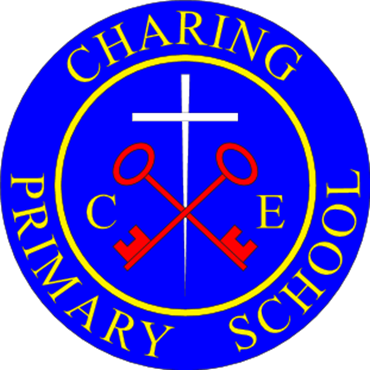
 *‘…those who hope in the Lord will renew their strength.*

*They will soar on wings like eagles; they will run and not grow weary,*

*they will walk and not be faint.’*  Isaiah 40:31

**connect | nurture | aspire | learn | excel | hope**





Multi Academy Trust Policy

Common Trust Policy, Use as Published

Data Retention Policy

Date adopted by Trust Board: 01/10/2020

Date of next Review: 09/2023

Date Adopted by Local Governing Body:

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Retention Guidelines

1. The purpose of the retention guidelines

Under the Freedom of Information Act 2000, schools 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. The retention schedule lays down the basis for normal processing under the Data Protection Act 1998, the Freedom of Information Act 2000 and the General Data Protection Regulation 2018.

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

The retention schedule refers to all records regardless of the media in which they are stored.

2. Benefits of a retention schedule

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

* Managing records against the retention schedules is deemed to be "normal processing" under the Data Protection Act 1998 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 of information 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.

3. Maintaining and amending the retention schedule

Where appropriate the retention schedule should be reviewed and amended to include any new record series created and remove any obsolete record series.

This retention schedule contains recommended retention periods for the different record series created and maintained by schools in the course of their business. The schedule refers to all information regardless of the media in which it is stored.

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 1998, the Freedom of Information Act 2000 and the General Data Protection Regulations 2018

Managing record series using these retention guidelines will be deemed to be "normal processing" under the legislation mentioned above. If record series are to be kept for longer or shorter periods than laid out in this document the reasons for this need to be documented.

This schedule will be reviewed on a regular basis/ every three years.

Using the Retention Schedule

The Retention Schedule is divided into five sections:

1. Management of the School
2. Human Resources
3. Financial Management of the School
4. Property Management
5. Pupil Management
6. Curriculum Management
7. Extra-Curricular Activities
8. Central Government and Local Authority

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1 Management of the School

This section contains retention periods connected to the general management of the school. This covers the work of the Governing Body, the Headteacher and the senior management team, the admissions process and operational administration.

1.1 Governing Body

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Protection Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **administrative life of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **record** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 1.1.1 Agendas for Governing Body | |  | There may be data | |  |  |  |  | One copy should be retained with the | |  | SECURE DISPOSAL1 | |  |
|  | meetings | |  | protection issues if | |  |  |  |  | master set of minutes. All other copies | |  |  |  |  |
|  |  |  |  | the meeting is | |  |  |  |  | can be disposed of | |  |  |  |  |
|  |  |  |  | dealing with | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | confidential issues | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | relating to staff | |  |  |  |  |  |  |  |  |  |  |
|  | 1.1.2 Minutes of Governing Body | |  | There may be data | |  |  |  |  |  |  |  |  |  |  |
|  | meetings | |  | protection issues if | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | the meeting is | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | dealing with | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | confidential issues | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | relating to staff | |  |  |  |  |  |  |  |  |  |  |
|  | Principal Set (signed) | |  |  |  |  |  |  |  | PERMANENT | |  | If the school is unable to | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | store these then they should | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | be offered to the County | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | Archives Service | |  |
|  | Inspection Copies2 | |  |  |  |  |  |  |  | Date of meeting + 3 years | |  | If these minutes contain any | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | sensitive, personal | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | information they must be | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | shredded. | |  |
|  | 1.1.3 Reports presented to the | |  | There may be data | |  |  |  |  | Reports should be kept for a minimum | |  | SECURE DISPOSAL or retain | |  |

1. In this context SECURE DISPOSAL should be taken to mean disposal using confidential waste bins, or if the school has the facility, shredding using a cross cut shredder
2. These are the copies which the clerk to the Governor 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.

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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** | |  |  | **Data Protection Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | **administrative life of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | **record** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Governing Body | |  | protection issues if | |  |  |  |  | of 6 years. However, if the minutes | |  | with the signed set of the | |  |
|  |  |  |  |  | the report deals with | |  |  |  |  | refer directly to individual reports then | |  | minutes | |  |
|  |  |  |  |  | confidential issues | |  |  |  |  | the reports should be kept permanently | |  |  |  |  |
|  |  |  |  |  | relating to staff | |  |  |  |  |  |  |  |  |  |  |
| 1.1.4 | | Meeting papers relating to the | |  | No | |  | Education Act 2002, | |  | Date of the meeting + a minimum of 6 | |  | SECURE DISPOSAL | |  |
|  |  | annual parents’ meeting held | |  |  |  |  | Section 33 | |  | years | |  |  |  |  |
|  |  | under section 33 of the Education | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Act 2002 | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.1.5 | | Instruments of Government | |  | No | |  |  |  |  | PERMANENT | |  | These should be retained in | |  |
|  |  | including Articles of Association | |  |  |  |  |  |  |  |  |  |  | the school whilst the school | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | is open and then offered to | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | County Archives Service | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | when the school closes | |  |
| 1.1.6 | | Trusts and Endowments managed | |  | No | |  |  |  |  | PERMANENT | |  | These should be retained in | |  |
|  |  | by the Governing Body | |  |  |  |  |  |  |  |  |  |  | the school whilst the school | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | is open and then offered to | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | County Archives Service | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | when the school closes. | |  |
| 1.1.7 | | Action plans created and | |  | No | |  |  |  |  | Life of the action plan + 3 years | |  | SECURE DISPOSAL | |  |
|  |  | administered by the Governing | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Body | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.1.8 | | Policy documents created and | |  | No | |  |  |  |  | Life of the policy + 3 years | |  | SECURE DISPOSAL | |  |
|  |  | administered by the Governing | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Body | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.1.9 | | Records relating to complaints | |  | Yes | |  |  |  |  | Date of the resolution of the complaint | |  | SECURE DISPOSAL | |  |
|  |  | dealt with by the Governing Body | |  |  |  |  |  |  |  | + a minimum of 6 years then review for | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  | further retention in case of contentious | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  | disputes | |  |  |  |  |
| 1.1.10 | | Annual reports required by the Department of Education and Skills | |  | No | |  |  | |  | Date of report + 10 years | |  | SECURE DISPOSAL | |  |
|  |  |  | |  |  |  |  |  | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |
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|  |  |  | | | | |  |  |  |  | Page **4** of **25** | |  |  |  |  |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Protection Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **administrative life of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **record** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Education (Governor’s | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Annual Reports) | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | (England) | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | (Amendment) | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Regulations 2002 SI | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | 2002 No 1171 | |  |  |  |  |  |  |  |
|  | 1.1.11 Proposals concerning the change | |  | No | |  |  |  |  | Date proposal accepted or declined + 3 | |  | SECURE DISPOSAL | |  |
|  | of status of a maintained school | |  |  |  |  |  |  |  | years | |  |  |  |  |
|  | including Specialist Status Schools | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | and Academies | |  |  |  |  |  |  |  |  |  |  |  |  |  |

**1.2 Head Teacher and Senior Management Team**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** | |  |  | **Data Protection Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |  |
|  | **1.2.1** Log books of activity in the school | | |  | There may be data | |  |  |  |  | Date of last entry in the | |  | These could be of permanent | |  |
|  |  | maintained by the Head Teacher | |  | protection issues if the | |  |  |  |  | book + a minimum of 6 | |  | historical value and should be | |  |
|  |  |  |  |  | log book refers to | |  |  |  |  | years then review | |  | offered to the County Archives | |  |
|  |  |  |  |  | individual pupils or | |  |  |  |  |  |  |  | Service if appropriate | |  |
|  |  |  |  |  | members of staff | |  |  |  |  |  |  |  |  |  |  |
|  | 1.2.2 Minutes of Senior Management | | |  | There may be data | |  |  |  |  | Date of the meeting + 3 | |  | SECURE DISPOSAL | |  |
|  |  | Team meetings and the meetings | |  | protection issues if the | |  |  |  |  | years then review | |  |  |  |  |
|  |  | of other internal administrative | |  | minutes refers to | |  |  |  |  |  |  |  |  |  |  |
|  |  | bodies | |  | individual pupils or | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | members of staff | |  |  |  |  |  |  |  |  |  |  |
|  | 1.2.3 Reports created by the Head | | |  | There may be data | |  |  |  |  | Date of the report + a | |  | SECURE DISPOSAL | |  |
|  |  | Teacher or the Management Team | |  | protection issues if the | |  |  |  |  | minimum of 3 years then | |  |  |  |  |
|  |  |  |  |  | report refers to | |  |  |  |  | review | |  |  |  |  |
|  |  |  |  |  | individual pupils or | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | members of staff | |  |  |  |  |  |  |  |  |  |  |
|  | 1.2.4 Records created by head teachers, | | |  | There may be data | |  |  |  |  | Current academic year + 6 | |  | SECURE DISPOSAL | |  |
|  |  | deputy head teachers, heads of | |  | protection issues if the | |  |  |  |  | years then review | |  |  |  |  |
|  |  | year and other members of staff | |  | records refer to | |  |  |  |  |  |  |  |  |  |  |
|  |  | with administrative responsibilities | |  | individual pupils or | |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | members of staff | |  |  |  |  |  |  |  |  |  |  |
|  | 1.2.5 Correspondence created by head | | |  | There may be data | |  |  |  |  | Date of correspondence + 3 | |  | SECURE DISPOSAL | |  |
|  |  | teachers, deputy head teachers, | |  | protection issues if the | |  |  |  |  | years then review | |  |  |  |  |
|  |  | heads of year and other members | |  | correspondence refers | |  |  |  |  |  |  |  |  |  |  |
|  |  | of staff with administrative | |  | to individual pupils or | |  |  |  |  |  |  |  |  |  |  |
|  |  | responsibilities | |  | members of staff | |  |  |  |  |  |  |  |  |  |  |
| 1.2.6 | | Professional Development Plans | |  | Yes | |  |  |  |  | Life of the plan + 6 years | |  | SECURE DISPOSAL | |  |
| 1.2.7 | | School Development Plans | |  | No | |  |  |  |  | Life of the plan + 3 years | |  | SECURE DISPOSAL | |  |

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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1.3** | **Admissions Process** | |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Protection Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.3.1 All records relating to the creation | | |  | No | |  | School Admissions’ | |  | Life of the policy + 3 years | |  | SECURE DISPOSAL | |
|  | and implementation of Charing’s Admissions’ Policy | |  |  |  |  | Policy School | |  | then review | |  |  |  |
|  |  |  |  |  |  |  | Admissions Code | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Statutory guidance for | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | admission authorities, | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | governing bodies, local | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | authorities, schools | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | adjudicators and | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | admission appeals | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | panels December 2014 | |  |  |  |  |  |  |
| 1.3.2 Admissions – if the admission is | | |  | Yes | |  | School Admissions Code | |  | Date of admission + 1 year | |  | SECURE DISPOSAL | |
|  | successful | |  |  |  |  | Statutory guidance for | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | admission authorities, | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | governing bodies, local | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | authorities, schools | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | adjudicators and | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | admission appeals | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | panels December 2014 | |  |  |  |  |  |  |
| 1.3.3 Admissions – if the appeal is | | |  | Yes | |  | School Admissions Code | |  | Resolution of case + 1 year | |  | SECURE DISPOSAL | |
|  | unsuccessful | |  |  |  |  | Statutory guidance for | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | admission authorities, | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | governing bodies, local | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | authorities, schools | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | adjudicators and | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | admission appeals | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | panels December 2014 | |  |  |  |  |  |  |
| 1.3.4 | Register of Admissions | |  | Yes | |  | School attendance: | |  | Every entry in the admission | |  | REVIEW Schools may wish to | |
|  |  |  |  |  |  |  | Departmental advice for | |  | register must be preserved | |  | consider keeping the admission | |
|  |  |  |  |  |  |  | maintained schools, | |  | for a period of three years | |  | register permanently as often | |

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | academies, independent | after the date on which the | schools receive enquiries from past |
|  |  | schools and local | entry was made.3 | pupils to confirm the dates they |
|  |  | authorities October |  | attended the school. |
|  |  | 2014 |  |  |
| 1.3.5 Admissions – Secondary Schools – | Yes |  | Current year + 1 year | SECURE DISPOSAL |
| Casual |  |  |  |  |
| 1.3.6 Proofs of address supplied by | Yes | School Admissions Code | Current year + 1 year | SECURE DISPOSAL |
| parents as part of the admissions |  | Statutory guidance for |  |  |
| process |  | admission authorities, |  |  |
|  |  | governing bodies, local |  |  |
|  |  | authorities, schools |  |  |
|  |  | adjudicators and |  |  |
|  |  | admission appeals |  |  |
|  |  | panels December 2014 |  |  |
| 1.3.7 Supplementary Information form | Yes |  |  |  |
| including additional information |  |  |  |  |
| such as religion, medical conditions |  |  |  |  |
| etc |  |  |  |  |
| For successful admissions |  |  | This information should be | SECURE DISPOSAL |
|  |  |  | added to the pupil file |  |
| For unsuccessful admissions |  |  | Until appeals process | SECURE DISPOSAL |
|  |  |  | completed |  |

1. School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014 p6

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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1.4** | **Operational Administration** | |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Protection Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.1 | General file series | |  | No | |  |  |  |  | Current year + 5 years then | |  | SECURE DISPOSAL | |
|  |  |  |  |  |  |  |  |  |  | REVIEW | |  |  |  |
| 1.4.2 1.4.2 Records relating to the | | |  | No | |  |  |  |  | Current year + 3 years | |  | STANDARD DISPOSAL | |
|  | creation and publication of the | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | school brochure or prospectus | |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.3 Records relating to the creation | | |  | No | |  |  |  |  | Current year + 1 year | |  | STANDARD DISPOSAL | |
|  | and distribution of circulars to | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | staff, parents or pupils | |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.4 Newsletters and other items with a | | |  | No | |  |  |  |  | Current year + 1 year | |  | STANDARD DISPOSAL | |
|  | short operational use | |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.5 1.4.5 Visitors’ Books and Signing in | | |  | Yes | |  |  |  |  | Current year + 6 years then | |  | SECURE DISPOSAL | |
|  | Sheets | |  |  |  |  |  |  |  | REVIEW | |  |  |  |
| 1.4.6 Records relating to the creation | | |  | No | |  |  |  |  | Current year + 6 years then | |  | SECURE DISPOSAL | |
|  | and management of Parent | |  |  |  |  |  |  |  | REVIEW | |  |  |  |
|  | Teacher Associations and/or Old | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Pupils Associations | |  |  |  |  |  |  |  |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 2 | Human Resources | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | This section deals with all matters of Human Resources management within the school. | | | | | | | | | | |  |  |  |
|  | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **2.1 Recruitment** | | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Prot** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end** |  |
|  |  |  |  | **Issues** |  |  |  |  |  |  |  |  | **of the** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **administrative life** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **of the record** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.1.1 All records leading up to the | | |  | Yes | |  |  |  |  | Date of appointment + 6 years | |  | SECURE DISPOSAL | |
|  | appointment of a new | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Headteacher | |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.1.2 All records leading up to the | | |  | Yes | |  |  |  |  | Date of appointment of successful candidate + 6 | |  | SECURE DISPOSAL | |
|  | appointment of a new member | |  |  |  |  |  |  |  | months | |  |  |  |
|  | of staff – unsuccessful | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | candidates | |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.1.3 All records leading up to the | | |  | Yes | |  |  |  |  | All the relevant information should be added to | |  | SECURE DISPOSAL | |
|  | appointment of a new member | |  |  |  |  |  |  |  | the staff personal file (see below) and all other | |  |  |  |
|  | of staff – successful candidate | |  |  |  |  |  |  |  | information retained for 6 months | |  |  |  |
| 2.1.4 | Pre-employment vetting | |  | No | |  | DBS Update Service Employer Guide | |  | The school does not have to keep copies of DBS | |  |  |  |
|  | information – DBS Checks | |  |  |  |  | June 2014: Keeping children safe in | |  | certificates. If the school does so the copy must | |  | SECURE DISPOSAL |  |
|  |  |  |  |  |  |  | education. July 2015 (Statutory | |  | NOT be retained for more than 6 months | |  |  |  |
|  |  |  |  |  |  |  | Guidance from Dept. of Education) | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Sections 73, 74 | |  |  |  |  |  |  |
| 2.1.5 Proofs of identity collected as | | |  | Yes | |  |  |  |  | Where possible these should be checked and a | |  |  |  |
|  | part of the process of checking | |  |  |  |  |  |  |  | note kept of what was seen and what has been | |  | SECURE DISPOSAL |  |
|  | “portable” enhanced DBS | |  |  |  |  |  |  |  | checked. If it is felt necessary to keep copy | |  |  |  |
|  | disclosure | |  |  |  |  |  |  |  | documentation then this should be placed on | |  |  |  |
|  |  |  |  |  |  |  |  |  |  | the member of staff’s personal file | |  |  |  |
| 2.1.6 | Pre-employment vetting | |  | Yes | |  | An employer’s guide to right to work | |  | Where possible these documents should be | |  |  |  |
|  | information – Evidence proving | |  |  |  |  | checks [Home Office May 2015] | |  | added to the Staff Personal File [see below], but | |  | SECURE DISPOSAL |  |
|  | the right to work in the United | |  |  |  |  |  |  |  | if they are kept separately then the Home | |  |  |  |
|  | Kingdom4 | |  |  |  |  |  |  |  | Office requires that the documents are kept for | |  |  |  |
|  |  |  |  |  |  |  |  |  |  | termination of Employment plus not less than | |  |  |  |

1. Employers are required to take a “clear copy” of the documents which they are shown as part of this process

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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |  | two years | |  |  |  |  |
| **2.2 Operational Staff Management** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | |  |
|  | **Basic file description** |  |  | **Data Prot** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end of the** | |  |
|  |  |  |  | **Issues** |  |  |  |  |  |  |  |  | **administrative life of the** | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | **record** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.2.1 | Staff Personal File | |  | Yes | |  |  |  |  | Termination of Employment + 6 years | |  | SECURE DISPOSAL | | |
| 2.2.2 | Timesheets | |  | Yes | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | | |
| 2.2.3 | Annual appraisal/ assessment | |  | Yes | |  |  |  |  | Current year + 5 years | |  | SECURE DISPOSAL | | |
|  | records | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **2.3 Management of Disciplinary and** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Grievance Processes** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | | |  |  | |  |  | |  |  | |  |  | | |
| 2.3.1 Allegation of a child protection | | |  | Yes | |  | “Keeping children safe in education | |  | Until the person’s normal retirement age | |  | SECURE DISPOSAL These | | |
|  | nature against a member of | |  |  |  |  | Statutory guidance for schools and | |  | or 10 years from the date of the | |  | records must be | | |
|  | staff including where the | |  |  |  |  | colleges March 2015”; “Working | |  | allegation whichever is the longer then | |  | shredded | | |
|  | allegation is unfounded5 | |  |  |  |  | together to safeguard children. A | |  | REVIEW. Note allegations that are found | |  |  |  |  |
|  |  |  |  |  |  |  | guide to inter-agency working to | |  | to be malicious should be removed from | |  |  |  |  |
|  |  |  |  |  |  |  | safeguard and promote the welfare of | |  | personnel files. If found they are to be | |  |  |  |  |
|  |  |  |  |  |  |  | children March 2015” | |  | kept on the file and a copy provided to | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | the person concerned | |  |  |  |  |
| 2.3.2 | Disciplinary Proceedings | |  | Yes | |  |  |  |  | Date of warning66 + 6 months | |  | SECURE DISPOSAL | | |
|  | Oral warning | |  |  |  |  |  |  |  | Date of warning + 6 months | |  | [If warnings are placed on | | |
|  | written warning – level 1 | |  |  |  |  |  |  |  | Date of warning + 12 months | |  | personal files then they | | |
|  | written warning – level 2 | |  |  |  |  |  |  |  | Date of warning + 18 months | |  | must be weeded from the | | |
|  | final warning | |  |  |  |  |  |  |  |  |  |  | file) | | |
|  | case not found | |  |  |  |  |  |  |  | If the incident is child protection related | |  | SECURE DISPOSAL | | |
|  |  |  |  |  |  |  |  |  |  | then see above otherwise dispose of at | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | the conclusion of the case | |  |  |  |  |

1. This review took place as the Independent Inquiry on Child Sexual Abuse was beginning. In light of this, it is recommended that all records relating to child abuse are retained until the Inquiry is completed. This section will then be reviewed again to consider any recommendations the Inquiry might make concerning record retention
2. Where the warning relates to child protection issues see above. If the disciplinary proceedings relate to a child protection matter please contact your Safeguarding Children Officer for further advice

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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2.4 Health and Safety** | | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Prot** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end of the** |  |
|  |  |  |  | **Issues** |  |  |  |  |  |  |  |  | **administrative life of the** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **record** |  |
| 2.4.1 Health and Safety Policy | | |  | No | |  |  |  |  | Life of policy + 3 years | |  | SECURE DISPOSAL | |
|  | Statements | |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.4.2 Health and Safety Risk | | |  | No | |  |  |  |  | Life of risk assessment + 3 years | |  | SECURE DISPOSAL | |
|  | Assessments | |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.4.3 Records relating to accident/ | | |  | Yes | |  |  |  |  | Date of incident + 12 years In the case of | |  | SECURE DISPOSAL | |
|  | injury at work | |  |  |  |  |  |  |  | serious accidents a further retention | |  |  |  |
|  |  |  |  |  |  |  |  |  |  | period will need to be applied | |  |  |  |
| 2.4.4 | Accident Reporting | |  | Yes | |  | Social Security (Claims and Payments) |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Regulations 1979 Regulation 25. Social |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Security Administration Act 1992 |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Section 8. Limitation Act 1980 |  |  |  |  |  |  |  |
|  |  | |  |  |  |  |  |  |  |  | |  |  | |
|  | Adults | |  |  |  |  |  |  |  | Date of the incident + 6 years | |  | SECURE DISPOSAL | |
|  |  | |  |  |  |  |  |  |  |  | |  |  | |
|  | Children | |  |  |  |  |  |  |  | DOB of the child + 25 years | |  | SECURE DISPOSAL | |
|  |  | |  |  | |  |  |  |  |  | |  |  | |
| 2.4.5 | Control of Substances | |  | No | |  | Control of Substances Hazardous to |  |  | Current year + 40 years | |  | SECURE DISPOSAL | |
|  | Hazardous to Health (COSHH) | |  |  |  |  | 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) |  |  |  |  |  |  |  |
| 2.4.6 Process of monitoring of areas | | |  | No | |  | Control of Asbestos at Work |  |  | Last action + 40 years | |  | SECURE DISPOSAL | |
|  | where employees and persons | |  |  |  |  | Regulations 2012 SI 1012 No 632 |  |  |  |  |  |  |  |
|  | are likely to have become in | |  |  |  |  | Regulation 19 |  |  |  |  |  |  |  |
|  | contact with asbestos | |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.4.7 Process of monitoring of areas | | |  | No | |  |  |  |  | Last action + 50 years | |  | SECURE DISPOSAL | |
|  | where employees and persons | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | are likely to have become in | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | contact with radiation | |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.4.8 Fire Precautions log books | | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
|  |  | | | | | | | Page **12** of **25** | | | |  |  |  |

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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **2.5 Payroll and Pensions** | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Prot** |  |  | **Statutory Provisions** |  |  | **Retention Period [Operational]** |  |  | **Action at the end of the** |  |
|  |  |  |  | **Issues** |  |  |  |  |  |  |  |  | **administrative life of the** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | **record** |  |
|  | 2.5.1 Maternity pay records | |  | Yes | |  | Statutory Maternity Pay (General) | |  | Current year + 3 years | |  | SECURE DISPOSAL | |
|  |  |  |  |  |  |  | Regulations 1986 (SI1986/1960), | |  |  |  |  |  |  |
|  |  |  |  |  |  |  | revised 1999 (SI1999/567) | |  |  |  |  |  |  |
|  | 2.5.2 Records held under Retirement | |  | Yes | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSL | |
|  | Benefits Schemes (Information | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Powers) Regulations 1995 | |  |  |  |  |  |  |  |  |  |  |  |  |

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3 Financial Management of the School

This section deals with all aspects of the financial management of the school including the administration of school meals.

**3.1 Risk Management and Insurance**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Basic file description** |  | **Data Prot Issues** | **Statutory Provisions** | **Retention Period** |  | **Action at the end of the** |  |
|  |  |  |  | **[Operational]** |  | **administrative life of the record** |  |
| 3.1.1 Employer’s Liability Insurance |  | No |  | Closure of the school + 40 |  | SECURE DISPOSAL |  |
| Certificate |  |  |  | years |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **3.2 Asset Management** | |  |  |  |  |  |  |
|  | **Basic file description** | **Data Prot Issues** | **Statutory Provisions** |  | **Retention Period** |  | **Action at the end of the** |
|  |  |  |  |  | **[Operational]** |  | **administrative life of the record** |
| 3.2.1 Inventories of furniture and | | No |  |  | Current year + 6 years |  | SECURE DISPOSAL |
|  | equipment |  |  |  |  |  |  |
| 3.2.2 Burglary, theft and vandalism | | No |  |  | Current year + 6 years |  | SECURE DISPOSAL |
|  | report forms |  |  |  |  |  |  |
|  | |  |  |  |  |  |  |
| **3.3 Accounts and Statements** | |  |  |  |  |  |  |
| **including Budget Management** | |  |  |  |  |  |  |
|  | **Basic file description** | **Data Prot Issues** | **Statutory Provisions** |  | **Retention Period** |  | **Action at the end of the** |
|  |  |  |  |  | **[Operational]** |  | **administrative life of the record** |
| 3.3.1 | Annual Accounts | **No** |  |  | **Current year + 6 years** |  | **STANDARD DISPOSAL** |
| 3.3.2 Loans and grants managed by the | | No |  |  | Date of last payment on the |  | SECURE DISPOSAL |
|  | school |  |  |  | loan + 12 years then REVIEW |  |  |
| 3.3.3 | Student Grant applications | Yes |  |  | Current year + 3 years |  | SECURE DISPOSAL |
| 3.3.4 All records relating to the creation | | No |  |  | Life of the budget + 3 years |  | SECURE DISPOSAL |
|  | and management of budgets |  |  |  |  |  |  |
|  | including the Annual Budget |  |  |  |  |  |  |
|  | statement and background papers |  |  |  |  |  |  |
| 3.3.5 Invoices, receipts, order books and | | No |  |  | Current financial year + 6 |  | SECURE DISPOSAL |
|  | requisitions, delivery notices |  |  |  | years |  |  |
| 3.3.6 3.3.6 Records relating to the | | No |  |  | Current financial year + 6 |  | SECURE DISPOSAL |
|  | collection and banking of monies |  |  |  | years |  |  |
| 3.3.7 Records relating to the | | No |  |  | Current financial year + 6 |  | SECURE DISPOSAL |
|  |  | |  | Page **14** of **25** | |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| identification and collection of |  |  | years |  |
| debt |  |  |  |  |

**3.4 Contract Management**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | Action at the end of the |  |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | administrative life of the record |  |  |
|  | 3.4.1 All records relating to the | |  | No | |  | Limitation Act 1980 | |  | Last payment on the | |  | SECURE DISPOSAL | |  |
|  | management of contracts under | |  |  |  |  |  |  |  | contract + 12 years | |  |  |  |  |
|  | seal | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 3.4.2 All records relating to the | |  | No | |  | Limitation Act 1980 | |  | Last payment on the | |  | SECURE DISPOSAL | |  |
|  | management of contracts under | |  |  |  |  |  |  |  | contract + 6 years | |  |  |  |  |
|  | signature | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 3.4.3 Records relating to the monitoring | |  | No | |  |  |  |  | Current year + 2 years | |  | SECURE DISPOSAL | |  |
|  | of contracts | |  |  |  |  |  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **3.5 School Fund** | | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |
| 3.5.1 | School Fund - Cheque books | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.5.2 School Fund - Paying in books | | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.5.3 School Fund – Ledger | | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.5.4 School Fund – Invoices | | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.5.5 School Fund – Receipts | | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.5.6 | School Fund - Bank statements | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.5.7 School Fund – Journey Books | | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
|  | | |  |  |  |  |  |  |  |  |  |  |  |  |
| **3.6 School Meals and Management** | | |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |
| 3.6.1 Free School Meals Registers | | |  | Yes | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |
| 3.6.2 | School Meals Registers | |  | Yes | |  |  |  |  | Current year + 3 years | |  | SECURE DISPOSAL | |
| 3.6.3 School Meals Summary Sheets | | |  | No | |  |  |  |  | Current year + 3 years | |  | SECURE DISPOSAL | |
|  |  | | | | |  |  | Page **15** of **25** | | | |  |  |  |

4 Property Management

This section covers the management of buildings and property

**4.1 Property Management**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Basic file description** |  | **Data Prot Issues** | **Statutory Provisions** | **Retention Period** |  | **Action at the end of the** |  |
|  |  |  |  | **[Operational]** |  | **administrative life of the record** |  |
| 4.1.1 Title deeds of properties belonging |  | No |  | PERMANENT |  |  |  |
| to the school |  |  |  | These should follow the |  |  |  |
|  |  |  |  | property unless the property |  |  |  |
|  |  |  |  | has been registered with the |  |  |  |
|  |  |  |  | Land Registry |  |  |  |
| 4.1.2 Plans of property belong to the |  | No |  | These should be retained |  |  |  |
| school |  |  |  | whilst the building belongs |  |  |  |
|  |  |  |  | to the school and should be |  |  |  |
|  |  |  |  | passed onto any new owners |  |  |  |
|  |  |  |  | if the building is leased or |  |  |  |
|  |  |  |  | sold. |  |  |  |
| 4.1.3 Leases of property leased by or to |  | No |  | Expiry of lease + 6 years |  | SECURE DISPOSAL |  |
| the school |  |  |  |  |  |  |  |
| 4.1.4 Records relating to the letting of |  | No |  | Current financial year + 6 |  | SECURE DISPOSAL |  |
| school premises |  |  |  | years |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **4.2 Maintenance** | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  |  |  | **Data Prot Issues** |  | **Statutory Provisions** |  | **Retention Period** |  |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  | **[Operational]** |  |  |  | **administrative life of the record** |  |  |
|  | 4.2.1 All records relating to the | |  |  | No | |  |  | Current year + 6 years | |  |  | SECURE DISPOSAL | |  |
|  | maintenance of the school carried | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | out by contractors | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 4.2.2 All records relating to the | |  |  | No | |  |  | books Current year + 6 years | |  |  | SECURE DISPOSAL | |  |
|  | maintenance of the school carried | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | out by school employees including | |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | maintenance log | |  |  |  |  |  |  |  |  |  |  |  |  |  |

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5 Pupil Management

This section includes all records which are created during the time a pupil spends at the school. For information about accident reporting see under Health and Safety above.

**5.1 Pupil’s Educational Record**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the administrative life of the** |  |  |
|  |  |  |  | **Issues** |  |  |  |  |  | **[Operational]** |  |  | **record** |  |  |
|  | 5.1.1 Pupil’s Educational Record required by The Education (Pupil Information) (England) Regulations 2005 | |  | Yes | |  | The Education (Pupil | |  |  |  |  |  |  |  |
|  |  | |  |  |  |  | Information) (England) | |  |  |  |  |  |  |  |
|  |  | |  |  |  |  | Regulations 2005 SI | |  |  |  |  |  |  |  |
|  | |  |  |  |  |  | 2005 No. 1437 | |  |  |  |  |  |  |  |
|  |  | |  |  |  |  |  | |  |  |  |  |  | |  |
|  | Primary | |  |  |  |  | Retain whilst the child | |  |  |  |  | The file should follow the pupil when he/she leaves | |  |
|  |  |  |  |  |  |  | remains at the primary | |  |  |  |  | the primary school. This will include: | |  |
|  |  |  |  |  |  |  | school | |  |  |  |  | • to another primary school | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | • to a secondary school | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | • to a pupil referral unit | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | • 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. | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | 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 record to the Local Authority | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | as it is more likely that the pupil will request the | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | record from the Local Authority | |  |
|  | Secondary | |  |  |  |  | Limitation Act 1980 | |  | Date of Birth of the pupil + | |  | SECURE DISPOSAL | |  |
|  |  |  |  |  |  |  | (Section 2) | |  | 25 years | |  |  |  |  |
|  | 5.1.2 Examination Results –Copies Public | |  | Yes | |  |  |  |  |  |  |  |  |  |  |
|  | Pupil | |  |  |  |  |  |  |  | This information should be | |  | All uncollected certificates should be returned to | |  |
|  |  |  |  |  |  |  |  |  |  | added to the pupil file | |  | the examination board. | |  |
|  | Internal | |  |  |  |  |  |  |  | This information should be | |  |  |  |  |
|  |  | | | | |  |  |  |  | Page **17** of **25** | |  |  |  |  |

added to the pupil file

**This review took place as the Independent Inquiry on Child Sexual Abuse was beginning. In light of this, it is recommended that all records relating to child abuse are retained until the Inquiry is completed. This section will then be reviewed again to take into account any recommendations the Inquiry might make concerning record retention**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 5.1.3 Child Protection information held | Yes | “Keeping children safe in | If any records relating to | SECURE DISPOSAL – these records |
| on pupil file |  | education Statutory | child protection issues are | MUST be shredded |
|  |  | guidance for schools and | placed on the pupil file, it |  |
|  |  | colleges March 2015”; | should be in a sealed |  |
|  |  | “Working together to | envelope and then retained |  |
|  |  | safeguard children. A guide | for the same period of time |  |
|  |  | to inter-agency working to | as the pupil file. |  |
|  |  | safeguard and promote the |  |  |
|  |  | welfare of children March |  |  |
|  |  | 2015” |  |  |
| 5.1.4 Child protection information held | Yes | “Keeping children safe in | DOB of the child + 25 years | SECURE DISPOSAL – these records |
| in separate files |  | education Statutory | then review This retention | MUST be shredded |
|  |  | guidance for schools and | period was agreed in |  |
|  |  | colleges March 2015”; | consultation with the |  |
|  |  | “Working together to | Safeguarding Children Group |  |
|  |  | safeguard children. A guide | on the understanding that |  |
|  |  | to inter-agency working to | the principal copy of this |  |
|  |  | safeguard and promote the | information will be found on |  |
|  |  | welfare of children March | the Local Authority Social |  |
|  |  | 2015” | Services record |  |

Retention periods relating to allegations made against adults can be found in the Human Resources section of this retention schedule.

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**5.2 Attendance**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  | **Data Prot** |  | **Statutory Provisions** |  | **Retention Period [Operational]** |  | **Action at the end of the** |  |
|  |  |  | **Issues** |  |  |  |  |  | **administrative life of the record** |  |
| 5.2.1 | Attendance Registers |  | Yes |  | School attendance: |  | Every entry in the attendance |  | SECURE DISPOSAL |  |
|  |  |  |  |  | Departmental advice for |  | register must be preserved for a |  |  |  |
|  |  |  |  |  | maintained schools, |  | period of three years after the |  |  |  |
|  |  |  |  |  | academies, independent |  | date on which the entry was |  |  |  |
|  |  |  |  |  | schools and local authorities |  | made. |  |  |  |
|  |  |  |  |  | October 2014 |  |  |  |  |  |
| 5.2.2 | Correspondence relating to |  |  |  | Education Act 1996 Section 7 |  | Current academic year + 2 years |  | SECURE DISPOSAL |  |
|  | authorised absence |  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **5.3 Special Educational Needs** | |  |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  | **Data Prot** |  | **Statutory Provisions** |  | **Retention Period [Operational]** |  | **Action at the end of the** |  |
|  |  |  | **Issues** |  |  |  |  |  | **administrative life of the record** |  |
| 5.3.1 Special Educational Needs files, | |  | Yes |  | Limitation Act 1980 (Section 2) |  | Date of Birth of the pupil + 25 |  | REVIEW NOTE: This retention |  |
|  | reviews and Individual Education |  |  |  |  |  | years |  | period is the minimum retention |  |
|  | Plans |  |  |  |  |  |  |  | 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. |  |
| 5.3.2 | Statement maintained under |  | Yes |  | Education Act 1996 Special |  | Date of birth of the pupil + 25 |  | SECURE DISPOSAL unless the |  |
|  | section 234 of the Education Act |  |  |  | Educational Needs and |  | years [This would normally be |  | document is subject to a legal hold |  |
|  | 1990 and any amendments made |  |  |  | Disability Act 2001 Section 1 |  | retained on the pupil file] |  |  |  |
|  | to the statement |  |  |  |  |  |  |  |  |  |
| 5.3.3 Advice and information provided | |  | Yes |  | Special Educational Needs and |  | Date of birth of the pupil + 25 |  | SECURE DISPOSAL unless the |  |
|  | to parents regarding educational |  |  |  | Disability Act 2001 Section 2 |  | years [This would normally be |  | document is subject to a legal hold |  |
|  | needs |  |  |  |  |  | retained on the pupil file] |  |  |  |
| 5.3.4 | Accessibility Strategy |  | Yes |  | Special Educational Needs and |  | Date of birth of the pupil + 25 |  | SECURE DISPOSAL unless the |  |
|  |  |  |  |  | Disability Act 2001 Section 14 |  | years [This would normally be |  | document is subject to a legal hold |  |
|  |  | | |  |  |  | Page **19** of **25** |  |  |  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  | retained on the pupil file] | |  |
|  | 6 Curriculum Management | |  |  |  |  |  |  |  |
|  | |  |  |  |  |  |  |  |  |
| **6.1 Statistics and Management** | |  |  |  |  |  |  |  |  |
| **Information** | |  |  |  |  |  |  |  |  |
|  | **Basic file description** |  | **Data Prot Issues** | | **Statutory Provisions** | |  | **Retention Period** | **Action at the end of the** |
|  |  |  |  |  |  |  |  | **[Operational]** | **administrative life of the record** |
| 6.1.1 | Curriculum returns |  | No | |  |  |  | Current year + 3 years | SECURE DISPOSAL |
| 6.1.2 Examination Results (Schools Copy) | |  | Yes | |  |  |  | Current year + 6 years | SECURE DISPOSAL |
|  |  |  |  | |  |  |  |  |  |
|  | SATS records – |  | Yes | |  |  |  | The SATS results should be | SECURE DISPOSAL |
|  | Results |  |  |  |  |  |  | recorded on the pupil’s |  |
|  |  |  |  |  |  |  |  | educational file and will |  |
|  |  |  |  |  |  |  |  | therefore be retained until |  |
|  |  |  |  |  |  |  |  | the pupil reaches the age of |  |
|  |  |  |  |  |  |  |  | 25 years. The school may |  |
|  |  |  |  |  |  |  |  | wish to keep a composite |  |
|  |  |  |  |  |  |  |  | record of all the whole year |  |
|  |  |  |  |  |  |  |  | SATs results. These could be |  |
|  |  |  |  |  |  |  |  | kept for current year + 6 |  |
|  |  |  |  |  |  |  |  | years to allow suitable |  |
|  |  |  |  |  |  |  |  | comparison |  |
|  | Examination Papers |  |  |  |  |  |  | The examination papers | SECURE DISPOSAL |
|  |  |  |  |  |  |  |  | should be kept until any |  |
|  |  |  |  |  |  |  |  | appeals/validation process is |  |
|  |  |  |  |  |  |  |  | complete |  |
| 6.1.3 | Published Admission Number |  | Yes | |  |  |  | Current year + 6 years | SECURE DISPOSAL |
|  | (PAN) Reports |  |  |  |  |  |  |  |  |
| 6.1.4 Value Added and Contextual Data | |  | Yes | |  |  |  | Current year + 6 years | SECURE DISPOSAL |
| 6.1.5 | Self-Evaluation Forms |  | Yes | |  |  |  | Current year + 6 years | SECURE DISPOSAL |

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**6.2 Implementation of Curriculum**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |  |
| 6.2.1 | Schemes of Work | |  | No | |  |  |  |  | Current year + 1 year | |  | It may be appropriate to review | |  |
| 6.2.2 | Timetable | |  | No | |  |  |  |  | Current year + 1 year | |  | these records at the end of each | |  |
| 6.2.3 | Class Record Books | |  | No | |  |  |  |  | Current year + 1 year | |  | year and allocate a further | |  |
| 6.2.4 | Mark Books | |  | No | |  |  |  |  | Current year + 1 year | |  | retention period or SECURE | |  |
| 6.2.5 Record of homework set | | |  | No | |  |  |  |  | Current year + 1 year | |  | DISPOSAL | |  |
|  |  | |  |  | |  |  |  |  |  | |  |  | |  |
| 6.2.6 | Pupils’ Work | |  | No | |  |  |  |  | Where possible pupils’ work | |  | SECURE DISPOSAL | |  |
|  |  |  |  |  |  |  |  |  |  | should be returned to the | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | pupil at the end of the | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | academic year if this is not | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | the school’s policy then | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | current year + 1 year | |  |  |  |  |

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7 Extra-Curricular Activities

**7.1 Educational Visits outside the**

**Classroom**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |  |
|  | 7.1.1 Records created by schools to | |  | No | |  | Outdoor Education Advisers’ | |  | Date of visit + 14 years | |  | SECURE DISPOSAL | |  |
|  | obtain approval to run an | |  |  |  |  | Panel National Guidance | |  |  |  |  |  |  |  |
|  | Educational Visit outside the | |  |  |  |  | website http://oeapng.info | |  |  |  |  |  |  |  |
|  | Classroom – Primary Schools | |  |  |  |  | specifically Section 3 - “Legal | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Framework and Employer | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Systems” and Section 4 - | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | “Good Practice”. | |  |  |  |  |  |  |  |
|  | 7.1.2 Records created by schools to | |  | No | |  | Outdoor Education Advisers’ | |  | Date of visit + 10 years | |  | SECURE DISPOSAL | |  |
|  | obtain approval to run an | |  |  |  |  | Panel National Guidance | |  |  |  |  |  |  |  |
|  | Educational Visit outside the | |  |  |  |  | website http://oeapng.info | |  |  |  |  |  |  |  |
|  | Classroom – Secondary Schools | |  |  |  |  | specifically Section 3 - “Legal | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Framework and Employer | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Systems” and Section 4 - | |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | “Good Practice” | |  |  |  |  |  |  |  |
|  | 7.1.3 Parental consent forms for school | |  | Yes | |  |  |  |  | Conclusion of the trip | |  | Although the consent forms could | |  |
|  | trips where there has been no | |  |  |  |  |  |  |  |  |  |  | be retained for DOB + 22 years, the | |  |
|  | major incident | |  |  |  |  |  |  |  |  |  |  | requirement for them being | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | needed is low and most schools do | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | not have the storage capacity to | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | retain every single consent form | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | issued by the school for this period | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | of time. | |  |
|  | 7.1.4 Parental permission slips for school | |  | Yes | |  | Limitation Act 1980 (Section 2) | |  | DOB of the pupil involved in | |  |  |  |  |
|  | trips – where there has been a | |  |  |  |  |  |  |  | the incident + 25 years The | |  |  |  |  |
|  | major incident | |  |  |  |  |  |  |  | permission slips for all the | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | pupils on the trip need to be | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | retained to show that the | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | rules had been followed for | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | all pupils | |  |  |  |  |
|  |  | | | | |  | Page **22** of **25** | | | | |  |  |  |  |

**7.2 Walking Bus**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |  |
|  | 7.2.1 Walking Bus Registers | |  | Yes | |  |  |  |  | Date of register + 3 years | |  | SECURE DISPOSAL [If these records | |  |
|  |  |  |  |  |  |  |  |  |  | This takes into account the | |  | are retained electronically any | |  |
|  |  |  |  |  |  |  |  |  |  | fact that if there is an | |  | backup copies should be destroyed | |  |
|  |  |  |  |  |  |  |  |  |  | incident requiring an | |  | at the same time] | |  |
|  |  |  |  |  |  |  |  |  |  | accident report the register | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | will be submitted with the | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | accident report and kept for | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | the period of time required | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | for accident reporting | |  |  |  |  |

**7.3 Family Liaison Officers and Home**

**School Liaison Assistants**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** | **Data Prot Issues** | **Statutory Provisions** | **Retention Period** | **Action at the end of the** |  |
|  |  |  |  | **[Operational]** | **administrative life of the record** |  |
| 7.3.1 | Day Books | Yes |  | Current year + 2 years then |  |  |
|  |  |  |  | review |  |  |
| 7.3.2 Reports for outside agencies - | | Yes |  | Whilst child is attending |  |  |
|  | where the report has been |  |  | school and then destroy |  |  |
|  | included on the case file created by |  |  |  |  |  |
|  | the outside agency |  |  |  |  |  |
| 7.3.3 | Referral forms | Yes |  | While the referral is current |  |  |
| 7.3.4 | Contact data sheets | Yes |  | Current year then review, if |  |  |
|  |  |  |  | contact is no longer active |  |  |
|  |  |  |  | then destroy |  |  |
| 7.3.5 | Contact database entries | Yes |  | Current year then review, if |  |  |
|  |  |  |  | contact is no longer active |  |  |
|  |  |  |  | then destroy |  |  |
| 7.3.6 | Group Registers | Yes |  | Current year + 2 years |  |  |

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8 Central Government and Local Authority

This section covers records created in the course of interaction between the school and the local authority.

**8.1 Local Authority**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 8.1.1 | Secondary Transfer Sheets | |  | Yes | |  |  |  |  | Current year + 2 years | |  | SECURE DISPOSAL | |  |
|  | (Primary) | |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 8.1.2 | Attendance Returns | |  | Yes | |  |  |  |  | Current year + 1 year | |  | SECURE DISPOSAL | |  |
| 8.1.3 | School Census Returns | |  | No | |  |  |  |  | Current year + 5 years | |  | SECURE DISPOSAL | |  |
| 8.1.4 Circulars and other information | | |  | No | |  |  |  |  | Operational use | |  | SECURE DISPOSAL | |  |
|  | sent from the Local Authority | |  |  |  |  |  |  |  |  |  |  |  |  |  |

**8.2 Central Government**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Basic file description** |  |  | **Data Prot Issues** |  |  | **Statutory Provisions** |  |  | **Retention Period** |  |  | **Action at the end of the** |  |  |
|  |  |  |  |  |  |  |  |  |  | **[Operational]** |  |  | **administrative life of the record** |  |  |
|  | 8.2.1 OFSTED reports and papers | |  | No | |  |  |  |  | Life of the report then | |  | SECURE DISPOSAL | |  |
|  |  |  |  |  |  |  |  |  |  | REVIEW | |  |  |  |  |
|  | 8.2.2 Returns made to central | |  | No | |  |  |  |  | Current year + 6 years | |  | SECURE DISPOSAL | |  |
|  | government | |  |  |  |  |  |  |  | SECURE DISPOSAL | |  |  |  |  |
|  | 8.2.3 Circulars and other information | |  | No | |  |  |  |  | Operational use | |  | SECURE DISPOSAL | |  |
|  | sent from central government | |  |  |  |  |  |  |  |  |  |  |  |  |  |

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