Amplify Education

Records Retention Policy

Date Created:
Author (Role Title): Head of Operations
Approved By Board of Trustees
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As part of the review process, this policy/procedure has been subject to an Equality Impact Assessment

Date	Page	Change	Purpose of Change

Values, Principles and Standards

Amplify is **a bold voice for Bristol** - speaking with ambition and channelling the city's spirit into a shared journey of belief, opportunity and citizenship.
We **build belief** in every young person, shaping a future where every voice matters, every story is heard, and every learner moves forward with confidence.
We **expand opportunities** and nurture potential to enrich each learner's journey with a passport of inclusive, academic, creative and musical experiences.
We **strengthen citizenship** through connecting communities, educating to build unity and pride. This is Bristol, represented.

Aims

To ensure that records are managed efficiently so the organisation can meet its legal and regulatory obligations and support effective institutional management. Well-maintained records safeguard the legal rights and interests of the school/Trust and provide reliable evidence of performance, decision-making and accountability.

This policy establishes the framework through which records are to be managed, monitored and audited. It sets out the:

- scope of the policy
- responsibilities for records management
- relationship with other relevant policies

Scope of the Policy

This policy applies to all records created, received or maintained by staff of the school/Trust in the course of their duties.

Records include any documents—whether in hard copy or electronic form—that support the business activities of the school/Trust and are retained for a defined period as evidence of transactions, decisions or activities.

A small proportion of these records will be selected for permanent preservation as part of the institution's archives and for future historical research. This process must be undertaken in consultation with the Records Service.

Responsibilities and accountabilities

The school/Trust has an overall responsibility to look after its records and record-keeping systems in line with legal and regulatory requirements. The Head Teacher or CEO has ultimate responsibility for this policy.

A named person within the school/Trust is responsible for overseeing records management. Their role includes:

- giving staff clear guidance on good record-keeping
- promoting and supporting compliance with this policy
- making sure information can be found easily, used appropriately and accessed at the right time
- checking at least once a year that records are stored securely and can be accessed when needed

All staff must make sure that the records they create or manage are accurate, kept up to date, stored safely and disposed of according to the school/Trust's records management guidelines.

This policy has been drawn up within the context of:

- Freedom of Information policy/publication scheme;
- Data Protection policies
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school/Trust

1. Management of the School

This section contains retention periods connected to the general management of the school/Trust. This covers the work of the Trust, the Local 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 Trustees, Members, Local 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 PERMANENT	SECURE DISPOSAL[1]
1.1.2	Minutes of Trustees, Members, Local Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		PERMANENT	
	Principal Set (signed)			PERMANENT	If the school/Trust is unable to store these then they should be offered to the County Archives Service
	Inspection Copies[2]			Date of meeting + 3 years	If these minutes contain any sensitive, personal information they must be shredded.
1.1.3	Reports presented to the Trustees, Members, Local Governing Body	There may be data protection issues if the report deals 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	SECURE DISPOSAL or retain with the signed set of the minutes

				reports should be kept permanently	

1.1 Trustees, Members Local Governing Body					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.1.5	Instruments of Government including Articles of Association	No		PERMANENT	These should be retained in the school/Trust whilst the school/Trust is open and then offered to County Archives Service when the school closes.
1.1.6	Trusts and Endowments managed by the Trustees, Members, Local Governing Body meetings	No		PERMANENT	These should be retained in the school/Trust whilst the school/Trust is open and then offered to County Archives Service when the school closes.
1.1.7	Action plans created and administered by the Trustees, Members, Local Governing Body meetings	No		Life of the action plan + 3 years	SECURE DISPOSAL
1.1.8	Policy documents created and administered by the Trustees, Members, Local Governing Body	No		Life of the policy + 3 years	SECURE DISPOSAL

1.1.9	Records relating to complaints dealt with by the Trustees, Members, Local 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
1.1.10	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
1.1.11	Proposals concerning the change of status of a CST school	No		Date proposal accepted or declined + 3 years	SECURE DISPOSAL

1.2 CEO, Head Teacher and Senior Management Team of School/Trust					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.2.1	Log books of activity in the school/Trust maintained by the Head Teacher/CEO	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 and should be offered to the County Archives Service if appropriate
1.2.2	Minutes of Senior Management Team meetings and the meetings of other	There may be data protection issues if the minutes refers to individual pupils or members of staff		Date of the meeting + 3 years then review	SECURE DISPOSAL

	internal administrative bodies				
1.2.3	Reports created by the Head Teacher/CEO or the Management Team	There may be data protection issues if the report refers to individual pupils or members of staff		Date of the report + a minimum of 3 years then review	SECURE DISPOSAL
1.2.4	Records created by CEO,, Head Teachers, deputy Head Teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the records refer to individual pupils or members of staff		Current academic year + 6 years then review	SECURE DISPOSAL
1.2.5	Correspondence created by CEO, head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the correspondence refers to individual pupils or members of staff		Date of correspondence + 3 years then review	SECURE DISPOSAL
1.2.6	Professional Development Plans	Yes		Life of the plan + 6 years	SECURE DISPOSAL
1.2.7	Trust/School Development Plans	No		Life of the plan + 3 years	SECURE DISPOSAL
1.2.8	Subject Access Requests	Yes		Date of the response to the request +7 years	SECURE DISPOSAL

1.3 Admissions Process

	Basic file description	Data Protection Issues	Statutory Provisions	Retention Period [Operational]	Action at the end of the administrative life of the record
1.3.1	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	Life of the policy + 3 years then review	SECURE DISPOSAL
1.3.2	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	Date of admission + 1 year	SECURE DISPOSAL
1.3.3	Admissions – if the appeal is unsuccessful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	Resolution of case + 1 year	SECURE DISPOSAL
1.3.4	Register of Admissions	Yes	School attendance[3]: Departmental advice for maintained schools, academies, independent schools and local authorities	Every entry in the admission register must be preserved for a period of six years after the date on which the entry was made[3]	REVIEW. Schools may wish to consider keeping the admission register permanently as often schools receive enquiries from past pupils to confirm

					the dates they attended the school
1.3.5	Admissions – Secondary Schools – Casual	Yes		Current year + 1 year	SECURE DISPOSAL
1.3.6	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	Current year + 1 year	SECURE DISPOSAL

1.3 Admissions Process					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.3.7	Supplementary Information form including additional information such as religion, medical conditions etc.	Yes			
	For successful admissions			This information should be added to the pupil file	SECURE DISPOSAL
	For unsuccessful admissions			Until appeals process completed	SECURE DISPOSAL

1.4 Operational Administration

	Basic file description	Data Protection Issues	Statutory Provisions	Retention Period [Operational]	Action at the end of the administrative life of the record
1.4.1	Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	STANDARD DISPOSAL
1.4.2	Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	STANDARD DISPOSAL
1.4.3	Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
1.4.4	Visitors' Books and Signing in Sheets	Yes		Current year + 6 years then REVIEW	SECURE DISPOSAL
1.4.5	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

2. Human Resources

This section deals with all matters of Human Resources management within the school.

2.1 Recruitment					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.1.1	All records leading up to the appointment of a new CEO/headteacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
2.1.2	All records leading up to the appointment of a new member of staff – successful candidates	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
2.1.3	All records leading up to the appointment of a new member of staff – unsuccessful 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
2.1.4	Pre-employment vetting information – DBS Checks	No	DBS Update Service Employer Guide: Keeping children safe in education. (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	

2.1.5	Proofs of identity 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 it is felt necessary to keep copy documentation then this should be placed on the member of staff's personal file	
2.1.6	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom[4]	Yes	An employer's guide to right to work checks [Home Office]	Where possible these documents 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 for termination of Employment plus not less than two years	

2.2 Operational Staff Management					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**

2.2.1	Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 7 years	SECURE DISPOSAL
2.2.2	Timesheets	Yes		Current year + 7 years	SECURE DISPOSAL
2.2.3	Annual appraisal/assessment records	Yes		Current year + 7 years	SECURE DISPOSAL

2.3 Management of Disciplinary and Grievance Processes					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.3.1	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"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children'	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 personnel files. If found they are to be kept on the file and a copy provided to the person concerned	SECURE DISPOSAL These records must be shredded
2.3.2	Disciplinary Proceedings	Yes			

	written warning			A written warning will be recorded on file but will be considered spent for disciplinary purposes after a period of 12 months from the date the warning is given.	SECURE DISPOSAL [If warnings are placed on personal files then they must be weeded from the file]
	final warning			A final written warning will recorded on file but will be considered spent for disciplinary purposes after a period of 24 months from the date the warning is given.	
	case not found			Investigation report and outcome letter retained on file but not disclosable for the purposes of referencesl	SECURE DISPOSAL

2.4 Health and Safety					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the**

					administrative life of the record
2.4.1	Health and Safety Policy Statements	No		Life of policy + 3 years	SECURE DISPOSAL
2.4.2	Health and Safety Risk Assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL
2.4.3	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
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 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	Current year + 40 years	SECURE DISPOSAL

			been made. Regulation 18 (2)		
2.4.6	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
2.4.7	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
2.4.8	Fire Precautions log books	No		Current year + 6 years	SECURE DISPOSAL
2.5 Payroll and Pensions					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.5.1	Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	SECURE DISPOSAL
2.5.2	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Last action + 50 years	SECURE DISPOSAL

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 Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.1.1	Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL

3.2 Asset Management					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.2.1	Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
3.2.2	Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL

3.3 Accounts and Statements including Budget Management

	Basic file description	Data Protection Issues	Statutory Provisions	Retention Period [Operational]	Action at the end of the 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 school/Trust	No		Date of last payment on the loan + 12 years then REVIEW	SECURE DISPOSAL
3.3.3	Student Grant applications	Yes		Current year + 3 years	SECURE DISPOSAL
3.3.4	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
3.3.5	Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL
3.3.6	Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
3.3.7	Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL

3.4 Contract Management					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the**

					administrative life of the record
3.4.1	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
3.4.2	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL
3.4.3	Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL

3.5 School Fund					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the 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 Management					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the 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

4. Property Management

This section covers the management of buildings and property.

4.1 Property Management					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
4.1.1	Title deeds of properties belonging to the school/Trust	No		PERMANENT These should follow the property unless the property has been registered with the Land Registry	
4.1.2	Plans of property belong to the school/Trust	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.	
4.1.3	Leases of property leased by or to the school/Trust	No		Expiry of lease + 6 years	SECURE DISPOSAL
4.1.4	Records relating to the letting of school/Trust premises	No		Current financial year + 6 years	SECURE DISPOSAL

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

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 Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the 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 remains at the primary school	The file should follow the pupil when he/she leaves the primary school. This will include: • 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 (Section 2)		Date of Birth of the pupil + 30 years	SECURE DISPOSAL

5.1 Pupil's Educational Record					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**

5.1.2	Examination Results – Pupil Copies	Yes			
	Public			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board.
	Internal			This information should be added to the pupil file	
5.1.3	Child Protection information held on pupil file	Yes	"Keeping children safe in education Statutory guidance for schools and colleges September 2018"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018"	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
5.1.4	Child protection information held in separate files	Yes	"Keeping children safe in education Statutory guidance for schools and colleges"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children"	DOB of the child + 25 years then review. This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local	SECURE DISPOSAL – these records MUST be shredded

				Authority Social Services record	
5.1.5	Child Protection Files	Yes	Should be stored in a separate child protection file. Keeping children safe in education sections 66, 67, 121 and 122. The Report of the Independent Inquiry into Child Sexual Abuse (IICSA), recommendation on access to records.	Until the child's 25th birthday. If the file relates to child sexual abuse, retain until the child's 75th birthday.	Dispose of records securely. Child protection files should be passed on to any new school a child attends. This should be transferred separately from the main pupil file.

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

5.2 Attendance					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.2.1	Attendance Registers	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities	Every entry in the attendance register must be preserved for a period of six years after the date on which the entry was made.	SECURE DISPOSAL

5.2.2	Correspondence relating to authorised absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

5.3 Special Educational Needs					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.3.1	Special Educational Needs files, reviews and Individual Education Plans	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 30 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

5.3.2	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 + 30 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.3.3	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 + 30 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
5.3.4	Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 30 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold

5.4 Medical and Medicine Permission form					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.4.1	Parental Medical consent Form	Yes		A minimum of 3 years after the child has left school	Secure disposal
5.4.2	Medicine Form. In certain cases, long-	Yes	Limitation Act 1980	Until the child's 21st birthday	Secure disposal

	term medical needs or conditions that may have safeguarding relevance, which includes chronic medical conditions such as diabetes or severe allergies requiring emergency medication.				

6. Curriculum Management

6.1 Statistics and Management Information					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the 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 –				
	Results	Yes		The SATS results should be recorded on the pupil's educational file and will therefore be retained until the	SECURE DISPOSAL

				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 should be kept until any appeals/validation process is complete	SECURE DISPOSAL
6.1.3	Published Admission Number (PAN) Reports	Yes		Current year + 6 years	SECURE DISPOSAL
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

6.2 Implementation of Curriculum					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
6.2.1	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
6.2.2	Timetable	No		Current year + 1 year	
6.2.3	Class Record Books	No		Current year + 1 year	

6.2.4	Mark Books	No		Current year + 1 year	further retention period or SECURE DISPOSAL
6.2.5	Record of homework set	No		Current year + 1 year	
6.2.6	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 policy then current year + 1 year	SECURE DISPOSAL

7. Extra Curricular Activities

7.1 Educational Visits outside the Classroom					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
7.1.1	Records created by 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	Date of visit + 14 years	SECURE DISPOSAL

			and Employer Systems" and Section 4 - "Good Practice".		
7.1.2	Records created by 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
7.1.3	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 issued by the school for this period of time.
7.1.4	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	

7.2 Walking Bus					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
7.2.1	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]

7.1 Educational Visits outside the Classroom					
	Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
7.3.1	Day Books	Yes		Current year + 2 years then review	

7.3.2	Reports for outside agencies - where the report has been included on the case file created by the outside agency	Yes		Whilst child is attending school and then destroy	
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	

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 Protection Issues**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
8.1.1	Secondary Transfer Sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL

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 sent from the Local Authority	No		Operational use	SECURE DISPOSAL

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

Monitoring and Review

- The Head of Operations is responsible for keeping the policy up to date and legally compliant and monitoring how it is implemented, reviewing it at least annually or as required.