

# Willingham Primary School



**GDPR Data Retention Policy**

**October 2019**

# 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. 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.

<b>1.1 Governing Body</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>1.1.1</b>	<b>Agendas for Governing Body meetings</b>	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		One copy should be retained with the master set of minutes. All other copies can be disposed of	SECURE DISPOSAL (1)
<b>1.1.2</b>	<b>Minutes of Governing Body meetings</b>	There may be data protection issues if the meeting is dealing with confidential issues relating to staff			
	<b>Principal Set (signed)</b>			PERMANENT	If the school is unable to store these then they should be offered to the County Archives Service

	<b>Inspection Copies (2)</b>			Date of meeting + 3 years	If these minutes contain any sensitive, personal information they must be shredded.
<b>1.1.3</b>	<b>Reports presented to the Governing Body</b>	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 reports should be kept permanently	SECURE DISPOSAL or retain with the signed set of the minutes
<b>1.1.4</b>	<b>Meeting papers relating to the annual parents' meeting held under section 33 of the Education Act 2002</b>	No	Education Act 2002, Section 33	Date of the meeting + a minimum of 6 years	SECURE DISPOSAL
<b>1.1.5</b>	<b>Instruments of Government including Articles of Association</b>	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.
<b>1.1.6</b>	<b>Trusts and Endowments managed by the Governing Body</b>	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.
<b>1.1.7</b>	<b>Action plans created and administered by the Governing Body</b>	No		Life of the action plan + 3 years	SECURE DISPOSAL
<b>1.1.8</b>	<b>Policy documents created and administered by the Governing Body</b>	No		Life of the action plan + 3 years	SECURE DISPOSAL
<b>1.1.9</b>	<b>Records relating to complaints dealt with by the Governing Body</b>	Yes		Date of the resolution of the complaint + a minimum of 6 years then	SECURE DISPOSAL

				review for further retention in case of contentious disputes	
1.1.10	<b>Annual Reports created under the requirements of the Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002</b>	No	Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171	Date of report + 10 years	SECURE DISPOSAL
1.1.11	<b>Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies</b>	No			SECURE DISPOSAL

<b>1.2 Headteacher and Management Team</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.2.1	<b>Log books of activity in the school maintained by the Head Teacher</b>	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	<b>Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies</b>	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

1.2.3	<b>Reports created by the Head Teacher or the Management Team</b>	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	<b>Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities</b>	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	<b>Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities</b>	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	<b>Professional Development Plans</b>	Yes		Life of the plan + 6 years	SECURE DISPOSAL
1.2.7	<b>School Development Plans</b>	No		Life of the plan + 3 years	SECURE DISPOSAL

<b>1.3 Admissions process</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.3.1	<b>All records relating to the creation and implementation of the School Admissions' Policy</b>	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Life of the policy + 3 years then review	SECURE DISPOSAL

1.3.2	<b>Admissions – if the admission is successful</b>	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Date of admission + 1 year	SECURE DISPOSAL
1.3.3	<b>Admissions – if the appeal is unsuccessful</b>	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Resolution of case + 1 year	SECURE DISPOSAL
1.3.4	<b>Register of Admissions</b>	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made.(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	<b>Admissions – Secondary Schools – Casual</b>	Yes		Current year + 1 year	SECURE DISPOSAL
1.3.6	<b>Proofs of address supplied by parents as part of the admissions process</b>	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Current year + 1 year	SECURE DISPOSAL
1.3.7	<b>Supplementary Information form including additional information such as religion, medical conditions etc</b>	Yes			

1.3.8	For successful admissions	Yes		This information should be added to the pupil file	SECURE DISPOSAL
1.3.9	For unsuccessful admissions	Yes		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	General file series	No		Current year + 5 years then REVIEW	SECURE DISPOSAL
1.4.2	Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	STANDARD DISPOSAL
1.4.3	Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	STANDARD DISPOSAL
1.4.4	Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
1.4.5	Visitors' Books and Signing in Sheets	Yes		Current year + 6 years then REVIEW	SECURE DISPOSAL
1.4.6	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

# Human Resources

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

<b>2.1 Recruitment</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>2.1.1</b>	<b>All records leading up to the appointment of a new headteacher</b>	Yes		Date of appointment + 6 years	SECURE DISPOSAL
<b>2.1.2</b>	<b>All records leading up to the appointment of a new member of staff – unsuccessful candidates</b>	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
<b>2.1.3</b>	<b>All records leading up to the appointment of a new member of staff – successful candidate</b>	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
<b>2.1.4</b>	<b>Pre-employment vetting information – DBS Checks</b>	No	DBS Update Service  Employer Guide  June 2014: Keeping children safe in education. July 2015 (Statutory Guidance from Dept. of Education) Sections 73, 74	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months	



2.1.5	<b>Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure</b>	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	<b>Pre-employment vetting information – Evidence proving the right to work in the United Kingdom<sup>4</sup></b>	Yes	An employer's guide to right to work checks [Home Office May 2015]	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	

<b>2.2 Operational Staff Management</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
2.2.1	Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years	SECURE DISPOSAL
2.2.2	Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
2.2.3	Annual appraisal/assessment records	Yes		Current year + 5 years	SECURE DISPOSAL

<b>2.3 Management of Disciplinary and Grievance Processes</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>2.3.1</b>	<b>Allegation of a child protection nature against a member of staff including where the allegation is unfounded<sup>5</sup></b>	Yes	<p>"Keeping children safe in education Statutory guidance for schools and colleges March 2015"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015"</p>	<p>Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer then</p> <p>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</p>	<p>SECURE DISPOSAL</p> <p>These records must be shredded</p>
<b>2.3.2</b>	<b>Disciplinary Proceedings</b>	Yes			
<b>2.3.2</b>	<b>Oral warning</b>			Date of warning <sup>6</sup> + 6 months	SECURE DISPOSAL
<b>2.3.2</b>	<b>Written warning - level 1</b>			Date of warning + 6 months	[If warnings are placed on personal files then they must be weeded from the file]
<b>2.3.2</b>	<b>Written warning – level 2</b>			Date of warning + 12 months	
<b>2.3.2</b>	<b>Final warning</b>			Date of warning + 18 months	
<b>2.3.2</b>	<b>Case not found</b>			If the incident is child protection related then see above otherwise dispose of at the conclusion of the case	SECURE DISPOSAL

<b>2.4 Health and Safety</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>2.4.1</b>	<b>Health and Safety Policy Statements</b>	No		Life of policy + 3 years	SECURE DISPOSAL
<b>2.4.2</b>	<b>Health and Safety Risk Assessments</b>	No		Life of risk assessment + 3 years	SECURE DISPOSAL
<b>2.4.3</b>	<b>Records relating to an accident / injury at work</b>	Yes		Date of incident + 12 years  In the case of serious accidents, a further retention period will need to be applied	SECURE DISPOSAL
<b>2.4.4</b>	<b>Accident Reporting</b>	Yes	Social Security (Claims and Payments) Regulations  1979 Regulation 25. Social Security Administration  Act 1992 Section 8. Limitation Act 1980		SECURE DISPOSAL
	<b>Adults</b>			Date of the incident + 6 years	SECURE DISPOSAL
	<b>Children</b>			DOB of the child + 25 years	SECURE DISPOSAL

<b>2.4.5</b>	<b>Control of Substances Hazardous to Health (COSHH)</b>	No	Control of Substances Hazardous to Health  Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)	Current year + 40 years	SECURE DISPOSAL
<b>2.4.6</b>	<b>Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos</b>	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL
<b>2.4.7</b>	<b>Process of monitoring of areas where employees and persons are likely to have become in contact with radiation</b>	No		Last action + 50 years	SECURE DISPOSAL
<b>2.4.8</b>	<b>Fire Precautions log books</b>	No		Current year + 6 years	SECURE DISPOSAL

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

# Financial Management of the School

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

<b>3.1 Risk Management</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
3.1.1	Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL

<b>3.2 Asset Management</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
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

<b>3.3 Accounts and Statements including Budget Management</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
3.3.1	<b>Annual Accounts</b>	No		Current year + 6 years	STANDARD DISPOSAL

3.3.2	Loans and grants managed by the school	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

<b>3.4 Contract Management</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
3.4.1	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment of 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 of the contract + 6 years	SECURE DISPOSAL
3.4.3	Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL

<b>3.5 School Fund</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>3.5.1</b>	<b>School Fund – Cheque books</b>	No		Current + 6 Years	SECURE DISPOSAL
<b>3.5.2</b>	<b>School Fund – Paying in books</b>	No		Current + 6 Years	SECURE DISPOSAL
<b>3.5.3</b>	<b>School Fund - Ledger</b>	No		Current + 6 Years	SECURE DISPOSAL
<b>3.5.4</b>	<b>School Fund - Invoices</b>	No		Current + 6 Years	SECURE DISPOSAL
<b>3.5.5</b>	<b>School Fund - Receipts</b>	No		Current + 6 Years	SECURE DISPOSAL
<b>3.5.6</b>	<b>School Fund – Bank statements</b>	No		Current + 6 Years	SECURE DISPOSAL
<b>3.5.7</b>	<b>School Fund – Journey Books</b>	No		Current + 6 Years	SECURE DISPOSAL

<b>3.6 School Meals Management</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>3.6.1</b>	<b>Free School Meals Registers</b>	Yes		Current year + 6 Years	SECURE DISPOSAL
<b>3.6.2</b>	<b>Schools Meals Registers</b>	Yes		Current year + 3Years	SECURE DISPOSAL
<b>3.6.3</b>	<b>Schools Meals Summary Sheets</b>	No		Current year + 3 Years	SECURE DISPOSAL

# Property Management

This section covers the management of the buildings and property

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



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

## 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 previously.

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

					<ul style="list-style-type: none"> <li>• to another primary school</li> <li>• to a secondary school</li> <li>• to a pupil referral unit</li> <li>• 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.</li> </ul> <p>If the pupil transfers to an independent school, transfers to home schooling or leaves the country the file should be returned to the Local Authority to be retained for the statutory retention period.</p> <p>Primary Schools do not ordinarily have sufficient storage space to store records for pupils who have not transferred in the normal way. It makes more sense to transfer the record to the Local Authority as it is more likely that the pupil will request the record from the Local Authority.</p>
<p><b>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.</b></p>					
5.1.3	Child Protection information held on pupil file	Yes	<p>“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”</p>	<p>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.</p>	<p>SECURE DISPOSAL – these records MUST be shredded</p>

5.1.4	Child protection information held in separate files	Yes	<p>“Keeping children safe in education</p> <p>Statutory guidance for schools and colleges March 2015”;</p> <p>“Working together to safeguard children. A</p> <p>guide to inter-agency working to safeguard and promote the welfare of children March 2015”</p>	<p>DOB of the child + 25 years then review</p> <p>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 Authority Social Services record</p>	SECURE DISPOSAL – these records MUST be shredded
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<b>5.2 Attendance</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>5.2.1</b>	<b>Attendance Registers</b>	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made.	SECURE DISPOSAL
<b>5.1.4</b>	<b>Correspondence relating to authorized absence</b>		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

<b>5.3 Special Educational Needs</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>5.3.1</b>	<b>Special Educational Needs files, reviews and Individual Education Plans</b>	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	REVIEW NOTE: This retention period is the minimum retention period that any pupil file should be kept. Some authorities choose to keep SEN files for a longer period of time to defend themselves in a "failure to provide a sufficient education" case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented.
<b>5.3.2</b>	<b>Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement</b>	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
<b>5.3.3</b>	<b>Advice and information provided to parents regarding educational needs</b>	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
<b>5.3.4</b>	<b>Accessibility Strategy</b>	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold

# Curriculum Management

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	Examinations Results (Schools Copy)	Yes		Current year + 6 years	SECURE DISPOSAL
	SATS records -	Yes			SECURE DISPOSAL
	Results			<p>The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years.</p> <p>The school may wish to keep a composite record of all the whole year SATs results.</p> <p>These could be kept for current year + 6 years to allow suitable comparison</p>	SECURE DISPOSAL
	Examination Papers			<p>The examination papers should be kept until any appeals/validation process is complete</p>	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 further retention period or  SECURE DISPOSAL
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	
6.2.5	Record of homework set	No		Current year + 1 year	
6.2.6	Pupil's 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	

# 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 <a href="http://oeapng.info">http://oeapng.info</a> specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice".	Date of visit + 14 years	SECURE DISPOSAL
7.1.2	Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools	No		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	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	

	been a major incident			to be retained to show that the rules had been followed for all pupils	
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<b>7.2 Family Liaison Officers and Home School Liaison Assistants</b>						
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>	
<b>7.2.1</b>	<b>Day Books</b>	Yes		Current year + 2 years then review		
<b>7.2.2</b>	<b>Reports for outside agencies - where the report has been included on the case file created by the outside agency</b>	Yes		Whilst child is attending school and then destroy		
<b>7.3.3</b>	<b>Referral forms</b>	Yes		While the referral is current		
<b>7.2.4</b>	<b>Contact data sheets</b>	Yes		Current year then review, if contact is no longer active then destroy		
<b>7.3.6</b>	<b>Contact database entries</b>	Yes		Current year then review, if contact is no longer active then destroy		
<b>7.2.7</b>	<b>Group Registers</b>	Yes		Current year + 2 years		



# Central Government and Local Authority

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

<b>8.1 Local Authority</b>					
<b>Basic file description</b>		<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [Operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>8.1.1</b>	<b>Secondary Transfer Sheets (Primary)</b>	Yes		Current year + 2 years	SECURE DISPOSAL
<b>8.1.2</b>	<b>Attendance Returns</b>	Yes		Current year + 1 year	SECURE DISPOSAL
<b>8.1.3</b>	<b>School Census Returns</b>	No		Current year + 5 years	SECURE DISPOSAL
<b>8.1.4</b>	<b>Circulars and other information sent from the Local Authority</b>	No		Operational use	SECURE DISPOSAL

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