

Bridlington School

Information Retention Policy



Approved by: Finance Committee

Date: 15 October 2020

Last reviewed on: 17 October 2019

Next review due by: 15 October 2021

Our school aims to ensure that all personal data collected about staff, students, parents, governors, visitors and other individuals is collected, stored and processed in accordance with the [General Data Protection Regulation \(GDPR\)](#) and the expected provisions of the Data Protection Act 2018 (DPA 2018) as set out in the [Data Protection Bill](#).

This policy applies to all personal data, regardless of whether it is in paper or electronic format.

In accordance with data protection principles, the school does not keep information for any longer than is necessary for the purposes for which it is processed.

Personal data that is no longer needed will be disposed of securely. Personal data that has become inaccurate or out of date will also be disposed of securely, where we cannot or do not need to rectify or update it. In this context, secure disposal should be taken to mean disposal using confidential waste bins / bags or shredded using a cross cut shredder.

For example, we will shred paper-based records, and overwrite or delete electronic files. We may also use a third party to safely dispose of records on the school's behalf. If we do so, we will require the third party to provide sufficient guarantees that it complies with data protection law.

In setting the Information Retention Policy, the school has considered the recommendations made by the Information and Records Management Society (IRMS), guidance set out in "Keeping Children Safe in Education", published by the DfE, the Health & Safety Executive (HSE) and the Local Authority.

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 leadership team, the admissions process and operational administration.

1.1 Governing Body (GB)

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
1.1.1	Agendas for GB meetings	Confidentiality issues relating to references to staff		One copy to be retained with the principal set of the minutes. Other copies can be disposed of	Secure Disposal
1.1.2	Minutes of GB meetings	Confidentiality issues relating to references to staff		One copy to be retained as the principle set of the minute. Other copies can be disposed of	If these minutes contain sensitive, personal information these must be shredded
	Principal Set (signed)			PERMANENT	
	Inspection Copies ¹			Date of meeting + 3 years	
1.1.3	Reports presented to the Governing Body	Confidentiality issues relating to references to staff		Reports should be kept for a minimum for 6 years. However, if the minutes refer directly to individual reports then the reports should be kept permanently with the principal set.	Secure Disposal or retain with a signed set of the minutes
1.1.4	Meeting papers related to the annual parent's meeting held under section 33 of the Education Act	No		Date of meeting + a minimum of 6 years	Secure Disposal
1.1.5	Instruments of Government including Articles of Association	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives should the school close
1.1.6	Trusts and Endowments managed by the Governing Body	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives should the school close

1. These are the copies which the Clerk to the Governors may wish to retain so that requestors can view all the appropriate information without the clerk needing to print off and collate redacted copies of the minutes each time a request is made

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
1.1.7	Action plans created and administered by the Governing Body	No		Life of the Action Plan + 3 years	Secure Disposal
1.1.8	Policy documents created and administered by the Governing Body	No		Life of the Action Plan + 3 years	Secure Disposal
1.1.9	Records dealing with complaints dealt with by the Governing Body	Yes		Date of the resolution of the complaint + a minimum of 6 years then review for further retention in the case of contentious disputes	Secure Disposal
1.1.10	Annual Reports created under the requirements of the Education (Governors Annual Reports) (England)(Amendment) Regulations 2002	No	the Education (Governors 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 maintained school including Specialist Status Schools & Academies	No		Date of proposal accepted or declined + 3 years	Secure Disposal

1.2 Headteacher and Senior Leadership Team

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
1.2.1	Log books of activity in the school maintained by the Headteacher	Confidentiality issues relating to references to individual staff or students		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 applicable
1.2.2	Minutes of Senior Leadership Team meetings and the meetings of other internal administrative bodies	Confidentiality issues relating to references to individual staff or students		Date of the meeting + 3 years then review	Secure Disposal
1.2.3	Reports created by the Headteacher or Leadership Team	Confidentiality issues relating to references to individual staff or students		Date of the report + a minimum 3 years then review	Secure Disposal
1.2.4	Records created by Headteachers, Deputy Headteachers, Assistant Headteachers and staff with administrative responsibilities	Confidentiality issues relating to references to individual staff or students		Current academic year + 6 years then review	Secure Disposal
1.2.5	Correspondence created by Headteachers, Deputy Headteachers, Assistant Headteachers and staff with administrative responsibilities	Confidentiality issues relating to references to individual staff or students		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	School Development Plans	No		Life of the plan + 3 years	Secure Disposal

1.3 Admissions Process

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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, school adjudicators and admission appeals panels December 2014	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, school adjudicators and admission appeals panels December 2014	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, school adjudicators and admission appeals panels December 2014	Resolution of case + 1 year	Secure Disposal
1.3.4	Register of Admissions	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 3 years after the date on which the entry was made ²	Secure Disposal
1.3.5	Admissions –Secondary Schools – Casual	Yes		Current year + 1 year	Secure Disposal

2. School attendance Departmental advice for maintained schools, academies, independent schools and local authorities October 2011 p6

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
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, school adjudicators and admission appeals panels December 2014	Current year + 1 year	Secure Disposal
1.3.7	Supplementary Information form including additional information such as religion, medical conditions etc: For successful admissions	Yes		This information should be added to the student record	Secure Disposal
	For unsuccessful admissions	Yes		Until appeals process is completed	Secure Disposal

1.4 Operational Administration

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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 students	No		Current year + 1 year	Standard Disposal
1.4.4	Newsletters or 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 + 1 year	Secure Disposal
1.4.5	Daily logs of phone calls / messages received at reception	Yes		Current year	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

2. Human Resources

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

2.1 Recruitment

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
2.1.1	All records leading up to the appointment of a new 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 – unsuccessful 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 – successful candidate	Yes		All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	Secure Disposal
2.1.4	Pre-employment vetting information – DBS Checks	No	DBS Update Service Employer Guide June 2014: Keeping children safe in education July 2015 (Statutory Guidance from DfE) 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.	Secure Disposal
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.	Secure Disposal
2.1.6	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom ³	Yes	An employer’s guide to right to work checks (Home Office May 2015)	Documents should be added to the Staff Personal File, then kept until the termination of employment + 6 years	Secure Disposal

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

2.2 Operational Staff Management

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
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 (this includes records saved in the Appraisal - M Drive)	Yes		Current year + 5 years	Secure Disposal

2.3 Management of Disciplinary and Grievance Processes

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
2.3.1	Allegation of a child protection nature against a member of staff including where the allegation is unfounded ⁴	Yes	“Keeping children safe in education, Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children, A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	Until the person’s normal retirement age or 10 years from the date of the allegation, whichever is the longest, 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			
	Oral Warning			Termination of Employment + 6 years	
	Written Warning – level 1			Termination of Employment + 6 years	Secure disposal
	Written Warning – level 2			Termination of Employment + 6 years	Secure Disposal

4. 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 be reviewed again to take into account any recommendations the Inquiry might make concerning record retention.

5. Where the warning relates to Child Protection issues refer to (3) above. If the disciplinary proceedings relate to a child protection matter please contact your Safeguarding Children Officer for further advice.

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
2.3.2 cont..	Final Warning			Termination of Employment + 6 years	Secure disposal
	Case not found			If the incident is child protection related then see above, otherwise dispose of at the conclusion of the case	Secure Disposal

2.4 Health and Safety

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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 & first aid records	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980; Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013		
	Adults			Date of the incident + 6 years	Secure Disposal
	Children			DOB of the child + 25 years	Secure Disposal
2.4.5	Medicines Administered to Students ⁶ Ongoing / long term Short term	Yes		Whilst the student is at school + 1 year Duration of need + 1 month	Secure Disposal

6. Records are disposed of at the end of each academic year. Parents of students needing medication are required to complete a new Administration of Medication Form and / or Care Plan at the start of each academic year.

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
2.4.6	Control of Substances Hazardous to Health (COSHH)	No	COSHH 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
2.4.7	Process of monitoring of areas where employees and persons are likely to have become into contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	Secure Disposal
2.4.8	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
2.4.9	Fire Precautions Log Book	No		Current year + 6 years	Secure Disposal

2.5 Payroll and Pensions

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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		Current year + 6 years	Secure Disposal
2.5.3	National Insurance Contributions	Yes	Social Security Contributions and Benefits Act 1992	Current year + 3 years	Secure Disposal
2.5.4	PAYE working sheets for deductions	Yes	The IT (Employment) Regulations 1993, Regulation 38	Current year + 3 years	Secure Disposal
2.5.5	Other payroll input documentation (overtime, timesheets, additional payments)	Yes		Current year + 3 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

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
3.1.1	Employer's Liability Insurance Certificate	No		Closure of the School + 40 years (although held by the Local Authority)	Secure Disposal

3.2 Asset Management

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
3.2.1	Inventories of furniture & equipment	No		Indefinitely	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

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
3.3.1	Annual Accounts	No		Current year + 6 years	Standard Disposal
3.3.2	Loans and grants managed by the school	No		Date of last payment of 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

3.4 Contract Management

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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

3.7 Other Financial Documents

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
3.7.1	Primary evidence of receipt and payment ⁷	Yes		Current year + 6 years	Secure Disposal
3.7.2	Secondary evidence of receipt and payment ⁸	Yes		Current year + 1 year	Secure Disposal
3.7.3	VAT documentation	Yes		Current year + 3 years	Secure Disposal
3.7.4	Other documentation (no single period of retention can be prescribed) ⁹	Yes		See note 8, below	Secure Disposal

As recommended by the Local Authority's Finance Manual for Schools 2017:

7. Primary evidence includes; Till (Z) readings, receipt books, bank paying-in books, cheque books, imprest books,

8. Secondary evidence includes; School meal registers, cafeteria records, meals & cash accounted for forms, delivery notes, school fund records, masterpiece prints, private photocopying income, purchase orders, audit till rolls, school sales records, recoupment claims, budgetary control records, private telephone income records, timesheets,

9. Asset register – indefinitely; Free meals notification – one year; Educational Visits Records – one year.

4. Property Management

This section covers the management of buildings and property.

4.1 Property Management

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
4.1.1	Title deeds of properties belonging to the school	No		PERMANENT These should follow the property unless the property has been registered with the Land Registry	
4.1.2	Plans of property belonging to the school	No		These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold	
4.1.3	Leases of property leased by or to the school	No		Expiry of lease + 6 years	Secure Disposal
4.1.4	Records relating to the letting of school premises	No		Current financial year + 6 years	Secure Disposal

4.2 Maintenance

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
4.2.1	All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	
4.2.2	All records relating to the maintenance of the school carried out by school employees including maintenance log books	No		Current year + 6 years	

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 2.4 Health & Safety

5.1 Pupil's Educational Record

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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		
	Secondary		Limitation Act 1980 (Section 2)	Date of birth of the pupil plus 25 years	Secure Disposal (at the end of the academic year in which the student would be 25)
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	

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 on pupil file	Yes	“Keeping children safe in education, Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children, A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file.	Secure Disposal These records MUST be shredded
-------	---	-----	--	---	--

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
5.1.4	Child Protection information held in separate file	Yes	"Keeping children safe in education, Statutory guidance for schools and colleges March 2015"; "Working together to safeguard children, A guide to inter-agency working to safeguard and promote the welfare of children March 2015"	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 Authority Social Services record	Secure Disposal These records MUST be shredded

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

5.2 Attendance

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
5.2.1	Attendance registers	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 3 years after the date on which the entry was made	Secure Disposal
5.2.2	Correspondence relating to authorized absence		Education Act 1996 Section 7	Current academic year + 2 years	Secure Disposal

5.3 Special Educational Needs

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
5.3.1	Special Educational Needs files, review and Individual Education Plans	Yes	Limitation Act 1980 (Section 2)	Date of birth of the pupil + 25 years	REVIEW Note: This retention period is the minimum that any pupil file should be kept. Some choose to keep SEN files for a longer period of time to defend themselves in a "failure to provide a sufficient education" case. If files are kept longer than this period, then the reasons for this should be documented.

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
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 Section 1	Date of birth of the pupil + 25 years	Secure Disposal <i>Unless the document is subject to a legal hold</i>
5.3.3	Advice and information provided to parents regarding educational needs	Yes	Special Educational Needs and Disability Act Section	Date of birth of the pupil + 25 years	Secure Disposal <i>Unless the document is subject to a legal hold</i>
5.3.4	Accessibility Strategy	Yes	Special Educational Needs and Disability Act Section 14	Date of birth of the pupil + 25 years	Secure Disposal <i>Unless the document is subject to a legal hold</i>

6. Curriculum Management

6.1 Statistics and Management Information

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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			
	Results			The SATS results should be recorded on the pupil's education file and will therefore be retained until the pupil reaches the age of 25 years. If kept as a separate record (of a whole year), these could be kept up to current year + 6 years, to allow a suitable comparison	Secure Disposal
	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

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
6.2.1	Schemes of Work	No		Current year + 1 year	
6.2.2	Timetable	No		Current year + 1 year	
6.2.3	Class Record Books	Yes		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
6.2.4	Mark Books	Yes		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
6.2.5	Record of homework set	No		Current year + 1 year	
6.2.6	Pupils' Written Work	Yes		Where possible pupils' work should be returned to the pupil at the end of the academic year.	Secure Disposal of confidential information contained within the planner. The rest of the book can be disposed of in the recycling bins.
6.2.7	Student Planners	Yes		Planners should be sent home with students at the end of the academic year	Secure Disposal of confidential information contained within the planner. The rest of the planner can be disposed of in the recycling bins.
6.2.8	Online Lessons	Yes		End of the term during which the lesson was recorded	Recordings to be deleted at the end of the term, by the teacher who recorded.

7. Extra-Curricular Activities

7.1 Educational Visits outside the Classroom

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
7.1.1	Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools	No	Outdoor Education Advisors' 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
7.1.2	Parental consent forms for school trips where there has been no major incident	Yes		Conclusion of the trip	Although consent forms could be retained for DOB + 25 years, the requirement for them being needed is low and most schools do not have the capacity to retain every consent form issued for this period of time
7.1.3	Parental consent forms for school trips – where there has been a major incident	Yes	Limitation Act 1980	DOB of the pupil involved + 25 years. The permission slips for all the pupils on the trip need to be retained to show that the rules have been followed for all pupils.	
7.1.4	Student / Staff medical information for use on educational visit	Yes		Should be retained for the duration of the visit with the consent form then disposed of in line with 7.1.2	

7.2 Walking Bus

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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)

7.3 Family Liaison Officers and Home School Liaison Assistants

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
7.3.1	Day Books	Yes		Current year + 2 years then review	Secure Disposal
7.3.2	Reports for outside agencies – where the report has been included on the case file created by the outside agency	Yes		Whilst the child is attending school, then destroy	Secure Disposal
7.3.3	Referral Forms	Yes		While the referral is current	Secure Disposal
7.3.4	Contact data sheets	Yes		Current year then review. If contact is no longer active then destroy	Secure Disposal
7.3.5	Contact database entries	Yes		Current year then review. If contact is no longer active then destroy	Secure Disposal
7.3.6	Group Registers	Yes		Current year + 2 years	Secure Disposal

8. Central Government & Local Authority

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

8.1 Local Authority

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
8.1.1	Attendance Returns	Yes		Current year + 1 year	Secure Disposal
8.1.2	School Census Returns	Yes		Current year + 5 years	Secure Disposal
8.1.3	Circulars and other information sent from the Local Authority	No		Operational Use	Secure Disposal

8.2 Central Government

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of 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

9. Management of IT Systems used to record information

This section covers records created in the normal course of business, recorded on different software packages available to staff and students.

9.1 Students' Work

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
9.1.1	Student School IT login	No		Whilst the child is attending school, then account to be disabled	
9.1.2	Student work – W Drive	No		Current year + 1 year after leaving	Deleted from IT network
9.1.3	Student biometric information	Yes		Record to be deleted at the end of the academic year that the student leaves school	
9.1.4	Student logins for school “Apps”	No		Whilst the child is attending school, then account to be disabled	

9.2 Data Processed by Staff

Ref	Basic File Description	Data Prot Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of administrative life of record
9.2.1	Emails	Yes		5 years	Emails to be deleted
9.2.2	Personal Folder - H Drive:	Yes			
9.2.3	Student work saved in P Drive (Class Folders)	Yes		Current academic year + 1 year	Delete from IT Network
9.2.4	Staff Class Folders – P Drive	Yes		Folders will be deleted if not used for 2 years	Delete from IT Network
9.2.5	Lessons – L Drive (Appraisal information)	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years	Delete from IT Network
9.2.6	Admin – Q Drive (Admin, First Aid, HR & Finance folders)	Yes		Information saved in this folder should be deleted in accordance with the type of information stored.	Delete from IT Network
9.2.7	Policies – R Drive	No		Policies reviewed and replaced and review annually	Delete from IT Network
9.2.8	Subjects – S Drive	Yes		Information saved in this folder should be deleted in	Delete from IT Network

				accordance with the type of information stored.	
9.2.9	Supply Cover – T Drive	No		Current academic year +1 year	Delete from IT Network
9.2.10	SIMS – Y Drive	Yes		Information saved in this folder should be deleted in accordance with the type of information stored.	Delete from IT Network