



The Gateway Primary Academy

Data Retention Policy

July 2026

Please note this policy will be reviewed annually and updated as required. It may be updated sooner in line with National and local guidance.

Written by: Mr Cassem

Approved by governing body:

Next review due: July 2028

1 Introduction

The School recognises that by efficiently managing its records, it will be able to comply with its legal and regulatory obligations and to contribute to its effective overall management. Records provide evidence for protecting the legal rights and interests of the school and provide evidence for demonstrating performance and accountability. This document provides the policy framework through which this effective management can be achieved and audited.

2 Scope of the Policy

2.1 This policy applies to all records that are created, received or maintained by staff of the school in the course of carrying out its functions.

2.2 Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created or received and then stored in hard copy or electronically.

2.3 A small percentage of the school's records may be selected for permanent preservation as part of the school's archives and for historical research.

3 Responsibilities

3.1 The school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Headteacher.

3.2 The person responsible for records management in the school will give guidance about good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. They will also monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately.

3.3 Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines.

4 Recording Systems

Information created by the school must be managed against the same standards regardless of the media in which it is stored.

4.1 Maintenance of Record Keeping Systems

i. It is important that filing information is properly resourced and is carried out on a regular basis. It is equally important that the files are weeded of extraneous information where appropriate on a regular basis. Removing information from a file once a freedom of information request has been made will be a criminal offence (unless it is part of normal processing).

ii. Applying retention periods is straightforward provided files are closed on a regular basis.

iii. Once a file has been closed, it should be moved out of the current filing system and stored either in a locked room in the school until it has reached the end of the retention period.

iv. Information security is very important especially when dealing with personal information or sensitive policy information. There are a number of basic rules: ·

- All personal information should be kept in lockable filing cabinets which are kept locked when the room is unattended.
- Personal information held on computer systems should be adequately password protected.
- Information should never be left up on a screen if the computer is unattended.
- Files containing personal or sensitive information should not be left out on desks overnight.
- Where possible sensitive personal information should not be sent by e-mail.
- If files need to be taken off the premises they should be secured in the boot of a car or in lockable containers.
- Teachers have been advised not to use data on memory sticks or other removable data carriers in order to access their files both at home and at school. Instead they should use the remote access.
- All computer information should be backed up regularly and the back-up should be stored off the site.

v. Information contained in emails should be filed into the appropriate electronic or manual filing system once it has been dealt with.

5 The Safe Disposal of Information Using the Data Retention Schedule

5.1 Files should be disposed of in line with the Data Retention Schedule. This is a process which should be undertaken on an annual basis.

5.2 Paper records containing personal information should be shredded using a cross-cutting shredder. Other files can be disposed of in the paper recycling bins. Loose papers should not be put in skips unless the skip has a lid. CD s/DVD s/ should be cut into pieces.

5.3 Electronic data should be archived on electronic media and deleted appropriately at the end of the retention period.

DATA RETENTION SCHEDULE

1. The purpose of the retention schedule
2. Benefits of a retention schedule
3. Maintaining and amending the retention schedule
4. What to do with records once they have reached the end of their administrative life
 - 4a Destruction of records
 - 4b Transfer of records of Archives
5. Retention Schedule

1. The purpose of the retention schedule

Under the Freedom of Information Act 2000, schools are required to maintain a retention schedule listing the records which the school creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use. Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems. If there is an administrative need to keep a certain record for longer than that shown in the retention schedule then the school may do so (documenting the reason for such further retention).

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

2. Benefits of a retention schedule

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

- Managing records against the retention schedule is deemed to be "normal processing" under the Data Protection Act 1998 soon to be GDPR and the Freedom of Information Act 2000. Provided members of staff are managing record series using the retention schedule they cannot be found guilty of unauthorised tampering with files once a freedom of information request or a data subject access request has been made.
- Members of staff can be confident about destroying information at the appropriate time.
- Information which is subject to Freedom of Information and Data Protection Legislation will be available when required.
- The school is not maintaining and storing information unnecessarily.

3. Maintaining and amending the retention schedule

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

4. What to do with records once they have reached the end of their administrative life

Destruction of records

Where records have been identified for destruction they should be disposed of in an appropriate way. All records containing personal information, or sensitive policy information, should be shredded or placed in the confidential waste system.

The Freedom of Information Act 2000 requires the school to maintain a list of records which have been destroyed and who authorised their destruction. Members of staff should record at least:

- File reference (or other unique identifier);
- File title (or brief description);
- No of files
- The name of the authorising officer

This could be kept in an Excel spreadsheet or other database format

Record Retention Schedule

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
Management of the Trust - Board of Trustees and sub-Committees				
Agendas for Board of Trustees and sub- committee meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		One copy should be retained with the master set of minutes. All other copies can be disposed of	Secure disposal ¹

Headteachers set (signed) Minutes for Board of Trustees and sub- committee meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		Permanent	
Reports presented to the Board of Trustees and sub-committees	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

Meeting papers relating to the annual parents'	No	Education Act 2002, Section 33	Date of the meeting + a minimum of 6 years	Secure disposal
--	----	-----------------------------------	--	-----------------

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
meeting held under section 33 of the Education Act 200				

Instruments of Government including Articles of Association	No		Permanent	These should be retained in the Academy whilst the Academy is open and then offered to the Department for Education if the Academy closes.
Action plans created and administered by the Board of Trustees and sub-committees	No		Life of the action plan + 3 years	Secure disposal
Policy documents created and administered by the Board of Trustees and sub-committees	No		Life of the action plan + 3 years	Secure disposal

Records relating to complaints dealt with by the Board of Trustees and sub-committees	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
Proposals concerning the change of status of a maintained school including Specialist	No		Date proposal accepted or declined + 3 years	Secure disposal

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the
------------------------	------------------------	----------------------	------------------	--------------------------

				administrative life of the record
Status Schools and Academies				
Management of the Trust - Trust Central Team, Head Teachers and Senior Leadership Teams				
Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	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
Reports created by the Head Teacher or the Management Team	There may be data protection issues if the report refers to		Date of the report + a minimum of 3 years then review	Secure disposal

	individual pupils or members of staff			
Records created by 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
Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with	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

administrative responsibilities				
---------------------------------	--	--	--	--

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
Professional Development Plans	Yes		Life of the plan + 6 years	Secure disposal
School Development Plans	No		Life of the plan + 3 years	Secure disposal
Management of the Trust - Admissions Process				

All records relating to the Admission Policy	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Life of the policy + 3 years then review	Secure disposal
Admissions - if the admission is successful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local	Date of admission + 1 year	Secure disposal

		authorities, schools adjudicators and admission appeals panels December 2014		
Admissions - if the appeal is unsuccessful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals	Resolution of case + 1 year	Secure disposal

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
		panels December 2014		
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 three years after the date on which the entry was made	Review. Schools may wish to consider keeping the admission register permanently as often schools receive enquiries from past pupils to confirm the dates they attended the school.

Proofs of address supplied by parents as part of the admissions process	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Current year + 1 year	Secure disposal
Supplementary Information form including additional information such as religion, medical	Yes		This information should be added to the pupil file	Secure disposal

conditions etc for successful admissions				
Supplementary Information form including additional information such as religion, medical			Until appeals process completed	Secure disposal

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
conditions etc for unsuccessful admissions				

Management of the Trust - Operational Administration				
General file series	No		Current year + 5 years then review	Secure disposal
Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	Standard disposal
Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	Standard disposal
Newsletters and other items with a short operational use	No		Current year + 1 year	Standard disposal

Visitors' Books and Signing in Sheets	Yes		Current year + 6 years then REVIEW	SECURE DISPOSAL
CCTV	Yes		30 days unless requested as part of an incident and then stored and archived for 12 months	Deleted electronically by Data Controller
Human Resources - Recruitment				
All records leading up to the appointment of a new headteacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
All records leading up to the appointment of a new member of staff -	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL

unsuccessful candidate				
---------------------------	--	--	--	--

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
All records leading up to the appointment of a new member of staff - successful candidate	Yes		All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	SECURE DISPOSAL

Pre-employment vetting information - DBS Checks	No	DBS Update Service Employer Guide June 2014: Keeping children safe in education. July 2026 (Statutory Guidance from Dept. of Education) Sections 73, 74	The Academy does not have to keep copies of DBS certificates. If the Academy does so the copy must NOT be retained for more than 6 months	
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	
Pre-employment vetting information - Evidence	Yes	An employer's guide to right to work checks	Where possible these documents should be	

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record

proving the right to work in the United Kingdom ²		[Home Office May 2015]	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	
Human Resources - Operational Staff Management				
Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years	SECURE DISPOSAL
Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL

Annual appraisal/ assessment records	Yes		Current year + 5 years	SECURE DISPOSAL
Human Resources - Management of Disciplinary and Grievance Processes				
Allegation of a child protection nature against a member of staff including where the allegation is unfounded ²	Yes	"Keeping children safe in education Statutory guidance for schools and colleges March 2015"; "Working together to safeguard	Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note	SECURE DISPOSAL These records must be shredded

² Employers are required to take a "clear copy" of the documents which they are shown as part of this process

³ 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

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
		children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015"	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	

Disciplinary Proceedings - oral warning	Yes		Date of warning ⁴ + 6 months	SECURE DISPOSAL
Disciplinary Proceedings - level 1 written warning	Yes		Date of warning + 6 months	SECURE DISPOSAL
Disciplinary Proceedings - level 2 written warning	Yes		Date of warning + 12 months	SECURE DISPOSAL
Disciplinary Proceedings - final warning	Yes		Date of warning + 18 months	SECURE DISPOSAL
Disciplinary Proceedings - case not found	Yes		If the incident is child protection related then see above otherwise	SECURE DISPOSAL

			dispose of at the conclusion of the case	
Human Resources - Health and Safety				
Health and Safety Policy Statement	No		Life of policy + 3 years	SECURE DISPOSAL

⁴ Where the warning relates to child protection issues see above. If the disciplinary proceedings relate to a child protection matter please contact your Safeguarding Children Officer for further advice

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative
------------------------	------------------------	----------------------	------------------	---

				life of the record
Health and Safety Risk Assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL
Records relating to accident/ injury at work	Yes		Date of incident + 12 years. In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL
Accident Reporting - adults	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security	Date of the incident + 6 years	SECURE DISPOSAL

		Administration Act 1992 Section 8. Limitation Act 1980		
Accident Reporting - children	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	DOB of the child + 25 years	SECURE DISPOSAL

Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002	Current year + 40 years	SECURE DISPOSAL
---	----	--	-------------------------	-----------------

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
-------------------------------	-------------------------------	-----------------------------	-------------------------	---

		Regulations had not been made. Regulation 18 (2)		
Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	No		Last action + 50 years	SECURE DISPOSAL

Fire Precautions log books	No		Current year + 6 years	SECURE DISPOSAL
Human Resources - Payroll and Pensions				
Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	SECURE DISPOSAL
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL
Financial Management of the Trust - Risk Management and Insurance				

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL
Financial Management of the Trust - Asset Management				
Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL
Financial Management of the Trust - Accounts and Statements including Budget Management				

Annual Accounts	No		Current year + 6 years	STANDARD DISPOSAL
Loans and grants managed by the Academy	No		Date of last payment on the loan + 12 years then REVIEW	SECURE DISPOSAL
All records relating to the creation and management of budgets including the Annual Budget statement and background paper	No		Life of the budget + 3 years	SECURE DISPOSAL
Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL

Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the identification and	No		Current financial year + 6 years	SECURE DISPOSAL

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
collection of debt				
Financial Management of the Trust - Contract Management				
All records relating to the	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL

management of contracts under signature				
Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL
Financial Management of the Trust - School Meals Management				
Free School Meals Registers	Yes		Current year + 6 years	SECURE DISPOSAL
School Meals Registers	Yes		Current year + 3 years	SECURE DISPOSAL
School Meals Summary Sheet	No		Current year + 3 years	SECURE DISPOSAL
Property Management				
Title deeds of properties belonging to the Academy	No		PERMANENT These should follow the property unless the	

			property has been registered with the Land Registry	
Plans of property belong to the Academy	No		These should be retained whilst the building belongs to the Trust and should be passed onto any new	

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
			owners if the building is leased or sold.	

Leases of property leased by or to the Academy	No		Expiry of lease + 6 years	SECURE DISPOSAL
Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL
Property Management - Maintenance				
All records relating to the maintenance of Academy properties carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
All records relating to the maintenance of the school carried out by school employees	No		Current year + 6 years	SECURE DISPOSAL

including maintenance log books				
---	--	--	--	--

Pupil Management - Pupil's Educational Record

Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005 - primary aged pupils	Yes	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437	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: 1. to another primary school 2. to a secondary school
---	-----	---	---	---

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the
------------------------	------------------------	----------------------	------------------	--------------------------

				administrative life of the record
--	--	--	--	--

				1. to a pupil referral unit 2. 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 independe
--	--	--	--	---

				nt 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 transferr ed 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
--	--	--	--	---

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005 - secondary aged pupils	Yes	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437 Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	SECURE DISPOSAL
Examination Results - Pupil Copies - Public	Yes		This information should be added to the pupil file	All uncollected certificates should be returned to the

				examination board
Examination Results - Pupil Copies - Internal	Yes		This information should be added to the pupil file	
Child Protection information held on pupil file	Yes	"Keeping children safe in education Statutory guidance for schools and colleges March 2015"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote	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. ⁵	SECURE DISPOSAL - these records MUST be shredded

		the welfare of children March 2015"		
Child protection	Yes	"Keeping children safe in	DOB of the child + 25	SECURE DISPOSAL -

⁵ This policy was approved 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

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative
------------------------	------------------------	----------------------	------------------	---

				life of the record
information held in separate files		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	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	these records MUST be shredded
Pupil Management - Attendance				

Attendance Register	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
Correspondence relating to authorized absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL
Pupil Management - Special Educational Needs				
Special Educational Needs files, reviews and Individual Education Plans	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	REVIEW

Statement maintained under section 234 of the Education Act 1990 and any amendments made	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years	SECURE DISPOSAL unless the document is subject to a legal hold
--	-----	--	--	---

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
to the statemen				
Advice and information provided to parents regarding educational	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years	SECURE DISPOSAL unless the document is subject to a legal hold

needs				
Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years	SECURE DISPOSAL unless the document is subject to a legal hold
Student Risk Assessments	Yes	Use of Reasonable Force (2013)	Date of birth of the pupil + 25 years	SECURE DISPOSAL unless the document is subject to a legal hold
Pupil Management - Safeguarding				
Record of Physical Intervention/Positive Handling - Physical	Yes	Use of Reasonable Force (2013)	Date of birth of the pupil + 25 years	SECURE DISPOSAL unless the document is

intervention bound and numbered book				subject to a legal hold
Absconding log	Yes	Statutory guidance on children who run away or go missing from home or care (January 2014)	Date of birth of the pupil + 25 years	SECURE DISPOSAL unless the document is subject to a legal hold
Curriculum Management - Statistics and Management Information				
Curriculum returns	No		Current year + 3 years	SECURE DISPOSAL
Examination Results (Schools Copy)	Yes		Current year + 6 years	SECURE DISPOSAL

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
SATS records - results	Yes		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. The school may wish to keep a composite record of all the whole year SATs results. These could be	SECURE DISPOSAL

			kept for current year + 6 years to allow suitable comparison	
SATS records - Examination Papers	Yes		The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
Published Admission Number (PAN) Reports	Yes		Current year + 6 years	SECURE DISPOSAL

Value Added and Contextual Data	Yes		Current year + 6 years	SECURE DISPOSAL
Self Evaluation Forms	Yes		Current year + 6 years	SECURE DISPOSAL
Curriculum Management - Implementation of Curriculum				
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

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
-------------------------------	-------------------------------	-----------------------------	-------------------------	---

				retention period or SECURE DISPOSAL
Timetable	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
Class Record Books	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
Mark Books	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
Record of homework set	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
Pupils' Work	No		Where possible pupils' work should be returned to the pupil at the end of	SECURE DISPOSAL

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
			the academic year	
Extra Curricular Activities - Educational Visits outside the Classroom				

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.in specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice".	Date of visit + 14 years	SECURE DISPOSAL
Records created by schools to obtain approval to run an Educational Visit outside the Classroom -	No	Outdoor Education Advisers' Panel National Guidance website http://oeapng.in	Date of visit + 10 years	SECURE DISPOSAL

Secondary Schools		fo specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice".		
Parental consent forms for school trips where there has been no major incident	Yes		Conclusion of the trip	SECURE DISPOSAL
Parental permission slips for school trips -	Yes	Limitation Act 1980 (Section 2)	DOB of the pupil involved in the incident	

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
where there has been a major incident			+ 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	
Extra Curricular Activities - Home to School Transport				

Registers for Home to School Transport	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
Extra Curricular Activities - Family Liaison Officers and Home School Liaison Assistants				
Day Books	Yes		Current year + 2 years then review	

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

Basic file description	Data protection issues	Statutory provisions	Retention period	Action at the end of the administrative life of the record
Contact data sheets	Yes		Current year then review, if contact is no	

			longer active then destroy	
Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	
Group Registers	Yes		Current year + 2 years	
Local Authority				
Secondary Transfer Sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
Attendance Returns	Yes		Current year + 1 year	SECURE DISPOSAL
School Census Returns	No		Current year + 5 years	SECURE DISPOSAL

Circulars and other information sent from the Local Authority	No		Operational use	SECURE DISPOSAL
Central Government				
OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
Returns made to central government			Current year + 6 years	SECURE DISPOSAL
Circulars and other information sent from central government			Operational use	SECURE DISPOSAL

1 In this context secure disposal should be taken to mean disposal using confidential waste bins in the case of paper records and permanent deletion of electronic records