

St Mary's Catholic Primary School

Records Retention Policy



Date adopted: Summer 2022

Review date: Summer 2025

PURPOSE

Section 46 of the Freedom of Information Act 2000 requires the school to follow a Code of Practice on managing its records. This policy has been updated in response to the introduction of the General Data Protection Regulations (GDPR) and the Data Protection Act 2018. It complements the Data Protection and Freedom of Information policy and should be read alongside the Information Security Policy.

St Mary's Catholic Primary School (the school) collects and uses certain types of personal information about staff, pupils, parents and other individuals who come into contact with the school in order provide education and associated functions. The school may be required by law to collect and use certain types of information to comply with statutory obligations related to employment, education and safeguarding and this policy is intended to ensure that personal information is dealt with properly and securely.

When collecting and storing information the school will take account of the following factors:

- The nature of the initial supply whether hard copy or electronic;
- The most efficient and effective way of storing records and information (hard copy and/or electronic);
- The confidential nature of the records and information stored;
- The security of the record systems used;
- Privacy and disclosure;
- And, its accessibility.

The governors recognise that by having the school's records managed efficiently, the school will be able to comply with its legal and regulatory obligations and to contribute to the effective overall management of the school.

Records provide evidence for protecting the legal rights and interest of the school and provide evidence for demonstrating performance and accountability. This policy provides the policy framework through which this effective management can be achieved and audited.

The governors have relied upon the guidance given by Stone King LLP and the resources of the Information and Records Management Society (IRMS).

In this policy 'we' and 'us' means the school.

1. INTRODUCTION

The main aim of this policy is to enable the school to manage its records (hard copy and electronic) effectively and in compliance with data protection and other regulation. As an organisation the school collects, holds, stores and creates significant amounts of data and information and this policy provides a framework of retention and disposal of categories of information and documents. Data will be stored and processed to allow for the efficient operation of the School. The School's Data Protection Policy outlines its duties and obligations under the GDPR.

The school is committed to the principles of data protection including the principle that information is only to be retained for as long as necessary for the purpose concerned.

The table below sets out the main categories of information that we hold, the length of time that we intend to hold them, and the reason for this.

Section 3 below sets out the legal requirements for certain categories of document and where the school has decided to keep information longer than the statutory requirement.

Section 3 of this policy sets out the destruction procedure for documents at the end of their retention period. The School Business Manager shall be responsible for ensuring that this is carried out appropriately and any questions regarding this policy should be referred to the School Business Manager or the Headteacher.

The schedule is a relatively lengthy document listing the many types of records used by the school and the applicable retention periods for each record type. The retention periods are based on business needs and legal requirements.

If a document or piece of information is reaching the end of its stated retention period, but the school is of the view that it should be kept longer, this should be referred by the School Business Manager or the Headteacher to the school's Data Protection Officer (or the company offering the DPO services) to make a decision as to whether or not the information should be kept, for how long, and note the new time limit and reason for the extension.

2. DESTRUCTION OF RECORDS

Where records have been identified for destruction they should be disposed of in an appropriate way. All information must be reviewed before destruction to determine whether there are special factors that mean destruction should be delayed, such as potential litigation, complaints or grievances.

All paper records containing personal information, or sensitive policy information should be shredded before disposal where possible. All other paper records should be disposed of by an appropriate waste paper merchant. All electronic information will be deleted.

When a document is at the end of its retention period, it should be dealt with in accordance with this policy.

2.1 Confidential waste

This should be made available for collection in the confidential waste bins or sacks located in the lockable storage cupboards near the Office or shredded on site.

Anything that contains personal information should be treated as confidential and securely destroyed.

When using the shredding machine reference should be made to a member of the Office Team to ensure that this is carried out effectively.

2.2 Other documentation

Other documentation can be deleted or placed in recycling bins where appropriate.

2.3 Automatic deletion

Certain information will be automatically archived by the computer systems.

Should it be necessary to retrieve any information, or prevent this happening in a particular circumstance, the matter should be referred to the Headteacher or School Business Manager for action. A clear explanation of the need to retrieve the information will need to be made and duly recorded.

2.4 Individual responsibility

Much of the retention and deletion of documents will be automatic, but when faced with a decision about an individual document, the staff member must ask the following questions: -

- Has the information come to the end of its useful life?
- Is there a legal requirement to keep this information or document for a set period (Refer to Retention Schedule below)?
- Would the information be likely to be needed in the case of any legal proceedings?
- Is it potentially relevant to an historic child abuse enquiry?
- Is the information contentious?
- Does it relate to an incident that could potentially give rise to proceedings?
- Would the document be useful for the organisation as a precedent, learning document, or for performance management processes?
- Is the document of historic or statistical significance?

If the decision is made to keep the document, this should be referred to the Headteacher or the School Business Manager with the reasons given which will be appropriately recorded.

Record of destroyed records

2.5 The School maintains a database of staff and pupil records which have been destroyed and who authorised their destruction. When destroying documents, the appropriate staff member should record in this list at least: -

- File reference (or other unique identifier);
- File title/description;
- Number of files; and
- Name of the authorising officer.

Archiving

Where records have been identified as being worthy of preservation over the longer term, arrangements should be made to transfer the records to the archives. A database of the records sent to the archives is maintained by [POSITION]. The appropriate staff member, when archiving documents should record in this list the following information: -

- File reference (or other unique identifier);
- File title/description;
- Number of files; and
- Name of the authorising officer.

2. DOCUMENT RETENTION SCHEDULE

	Basic file description	Data Protection Issues?	Statutory Provisions	Retention Period	Action at the end of the retention period
1. Child protection					
1.1	Child protection information held on the child's file	Yes	Keeping Children Safe in Education Working together to Safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children, February 2017	Usually, only kept for as long as is necessary. Child protection files will be passed on to any new school the child attends. With regard to the moratorium declared by the Independent Inquiry in to Child Sexual Abuse, any file relating to child sexual abuse, sexual exploitation or sexual activity will be retained until the Inquiry concludes. IICSA	Secure disposal

1.2	Child protection information held in a separate file	Yes	Keeping Children Safe in Education	DOB of the child + 25 years then review With regard to the moratorium declared by the Independent Inquiry in to Child Sexual Abuse, any file relating to child sexual abuse, sexual exploitation or sexual activity will be retained until the Inquiry concludes.	Secure disposal
1.3	Allegation of a child protection nature against a member of staff, excluding where the allegation is malicious.	Yes	Education Act 2002 Keeping Children Safe in Education	Until the individual's normal retirement age or 10 years from the date of the allegation (whichever is longer).	Secure disposal
1.4	Allegation of a child protection nature against a member of staff, including	Yes	Keeping Children Safe in Education	Details of allegations that are found to be malicious should be removed from	Secure disposal

	where the allegation is malicious			personnel records.	
2. Corporate					
2.1	Minutes and resolutions of full Governing Body meetings	Yes if there are confidential items especially those relating to staff or children.	Data Protection Act 2018 Companies Act 2006 Charities Act 2011	Permanent or, at least, 10 years.	Secure disposal
2.2	Minutes and resolutions of meetings of Members	Yes if there are confidential items especially those relating to staff or children.	Data Protection Act 2018 Companies Act 2006 Charities Act 2011	At least 10 years	Secure disposal
2.2.1	Inspection copies of minutes	No	Best practice (IRMS)	Date of meeting + 3 years	Secure disposal
2.3	Agendas	Yes if there are confidential items especially those relating to staff.	Companies Act 2006 Charities Act 2011	One copy to be retained with the master set of the minutes. All other copies can be destroyed.	Secure disposal if appropriate
2.4	Reports presented to	Yes if the report deals		Reports should be kept for a minimum	Secure disposal unless kept

	the governing body and its committees.	with confidential issues relating to staff or pupils		of 6 years. If the minutes refer to individual reports these should be kept permanently with the minutes.	permanently with the minutes
2.5	Instruments of Governance (Articles of Association and Memorandum of Association)		Companies Act 2006 Charities Act 2011	Permanent	N/A
2.6	Academy Funding Agreement		Charities Act 2011	Permanent	N/A
2.7	Action plans created and managed by the Governing Body	No unless concerning personnel issues	Best practice (IRMS)	Life of the action plan + 3 years	Secure Disposal
2.6	Policy documents created and administered by the Governing Body	No	Best practice (IRMS)	Life of the policy + 3 years	Secure disposal
2.7	Records relating to complaints dealt with by the Governing	Yes	Limitation Act 1980	Date of the resolution of the complaint + a minimum of 6 years then review for	Secure disposal

	Body			further retention in contentious disputes.	
2.8	Annual reports created under the requirements of the Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	No	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	Date of report + 10 years	Secure disposal
2.9	Minutes of Senior Leadership Team meetings and the meetings of other internal administrative bodies.	There may be data protection issues if the minutes refer to individual pupils or staff members.	Best practice (IRMS)	Date of the meeting + 3 years then review	Secure disposal
2.10	Log books of activity in the school	There may be data protection issues if the log book refers to individual pupils or staff members.	Limitation Act 1980	Date of last entry + 6 years then review	Since these could be of permanent historical value these should be offered to an appropriate archive.

2.11	Reports created by the Headteacher or the Senior Leadership Team	There may be data protection issues if the reports refers to individual pupils or staff members.	Best practice (IRMS)	Current academic year + 6 years then review	Secure disposal
2.12	Records members of staff with administrative responsibilities.	There may be data protection issues if the records refers to individual pupils or staff members.	Best practice (IRMS)	Current academic year + 6 years then review	Secure disposal
2.13	Correspondence created by the Headteacher, Deputy Headteacher, Assistant Head and other members of staff with administrative responsibility.	There may be data protection issues if the correspondence refers to individual pupils or staff members.	Best practice (IRMS)	Date of correspondence + 3 years then review	Secure disposal
2.14	Development Plans	Yes	Best practice (IRMS)	Life of the plan + 6 years	Secure disposal
3. Admissions Process					
3.1	All records	No	School Admission Code	Life of the policy +	Secure disposal

	relating to the creation and implementation of the school's Admissions policy		Statutory guidance for admission authorities, governing bodies, 2014	3 years	
3.2	Admissions - if successful	Yes	School Admission Code Statutory guidance for admission authorities, governing bodies, 2014	Date of admission + 1 year	Secure disposal
3.3	Admissions - if the appeal is unsuccessful	Yes	School Admission Code Statutory guidance for admission authorities, governing bodies, 2014	Resolution of the case + 1 year	Secure disposal
3.4	Register of admissions	Yes	School attendance: DfE advice, 2014	Every entry in the admission register (or equivalent) must be preserved for a period of three years after the date on which the entry was made.	The school may wish to keep the admissions register permanently as part of its archive as there are times when past pupils do query attendance dates at the school.
3.5	Proof of address supplied by parents as part	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and	Current year + 1 year	Secure disposal

	of the admissions process (if applicable)		admission appeals panels December 2014		
3.6	Supplementary information (for successful admissions)	Yes	Added to pupil file	See above	Secure disposal
3.7	Supplementary information (for unsuccessful admissions)	Yes	Until the appeals process is completed	At the end of the appeals process	Secure disposal
4. Operational Administration					
4.1	General files	Unlikely	Best practice (IRMS)	Current year + 5 years then review	Secure disposal
4.2	Records relating to the creation and publication of the school prospectus	No	Best practice (IRMS)	Current year + 3 years	Standard disposal
4.3	Records relating to the creation and distribution of circulars to staff, parents	No	Best practice (IRMS)	Current year + 1 year	Standard disposal

	or pupils				
4.4	Newsletters and other items with a short operational use.	No	Best practice (IRMS)	Current year + 1 year	Standard disposal
4.5	Visitors' Book and Signing In sheets	Yes	Best practice (IRMS)	Current year + 6 years then review	Secure disposal
4.6	Records relating to the creation and management of the Parent Teacher Associations and/or Alumni	No	Best practice (IRMS)	Current year + 6 years then review	Secure disposal
5. Human Resources					
5.1	All records leading up to the appointment of a new headteacher	Yes	Best practice (IRMS)	Date of appointment + 6 years	Secure disposal
5.2	All records leading up to the appointment of a new member	Yes		All the relevant information should be added to the staff personal file (see below) and all	Secure disposal

	of staff - successful candidates			other information retained for 6 months	
5.3	All records (applications, CVs and all related materials) leading up to the appointment of a new member of staff - unsuccessful candidates	Yes	ICO Employment Practices Code (Recruitment & Selection) Disability Discrimination Act 1995 Race Relations Act 1976	12 months after the notification of the outcome of the application	Secure disposal
5.4	Disclosure and Barring Service checks	Yes	DBS Update Service Employer Guide Keeping Children Safe in Education	Record only satisfactory / unsatisfactory result and delete all other information. If a copy is kept, it is not to be retained beyond 6 months	Secure disposal
5.5	Proofs of identity collected as part of the recruitment process	Yes	Keeping children safe in education The Education (Independent School Standards) Regulations 2014 (which applies to academies)	Where possible these should be checked and a note kept of what was seen, what has been checked and who checked it. If it is felt necessary to	Secure disposal

				keep copy documentation then this should be placed on the member of staff's personal file	
5.6	Pre-employment vetting information	Yes	Keeping Children Safe in Education An employer's guide to right to work checks (Home Office 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	Secure disposal
5.7	Staff Personal File	Yes	Limitation Act 1980	Termination of Employment + 6 years	Secure disposal
5.8	Annual appraisal	Yes		Current year + 5 years	Secure disposal
5.9	Allegation of a child protection nature against a member of staff including where the	Yes	Keeping Children Safe in Education	Until the person's normal retirement age or 10 years from the date of the allegation whichever is the	Secure disposal

	allegation is unfounded			longer then REVIEW. If allegations are found they are to be kept on the file and a copy provided to the person concerned. Note allegations that are found to be malicious should be removed from personnel files.	
5.10	Disciplinary proceedings	Yes			
	Oral warning			Date of warning + 6 months	Secure disposal
	1 st written warning			Date of warning + 6 months	
	2 nd written warning			Date of warning + 12 months	
	Final warning			Date of warning + 18 months	
	Case not found			If the incident is child protection related then see above other case materials to be disposed of at the	

				conclusion of the case.	
5.11	Maternity Pay Records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	Secure disposal
5.12	Records held under Retirement Benefits Schemes (information Powers) Regulations 1995	Yes	Best practice	Current year + 6 years	Secure disposal
5.13	Payroll, employee, income tax and national insurance records: P45, P60, P11D etc.	Yes	Taxes Management Act 1970	6 years from the end of the current year	Secure disposal
5.14	Maternity Pay	Yes	Statutory Maternity Pay Regulations	3 years after the end of the current year	Secure disposal
5.15	Sick pay	Yes	Statutory Sick Pay (General) Regulations	3 years after the end of the current year	Secure disposal
5.16	National Minimum Wage	Yes	National Minimum Wage Act	3 years after the end of the current	Secure disposal

				year	
5.17	Foreign national ID documents	Yes	Immigration (Restrictions on Employment) Order 2007	Minimum 2 years from the end of employment	Secure disposal
5.18	HR and training files	Yes	Limitation Act 1970	Maximum 6 years from the end of employment	Secure disposal
5.19	Records regarding working time	Yes	Working Time Regulations 1998	2 years	Secure disposal
5.22	Volunteer records	Yes	Keeping Children Safe in Education	Undertake assessment to decide on retention period taking account of risk (e.g. safeguarding re work with children)	Secure disposal
5.23 Pensions					
5.23.1	Records about employees	Yes	Detailed Guidance for Employers issued by the Pensions Regulator (see website)	In cases of pensions the school will keep records showing how it has met its legal duties, including: - the names and addresses of those put into a pension	Secure disposal
5.23.2	Details of schemes	Yes			
5.23.3	Trust Deeds and Rules and any HMRC approvals (if	No			

	applicable)			<p>scheme;</p> <p>records that show when money was paid into the pension scheme;</p> <p>any requests to join or leave a pension scheme;</p> <p>The pension scheme reference or registry number.</p> <p>Current year + 6 years</p> <p>Requests to leave the pension scheme must be kept for the current year + 4 years.</p>	
5.23.4	Pension related policies	No			
6. Health and Safety					
6.1	Health and Safety policy statements	No	Best practice (IRMS)	Life of policy + 3 years	Secure disposal
6.2	Health and Safety risk assessments	No	Best practice (IRMS)	Life of risk assessment + 3 years	Secure disposal
6.3	Records relating to	Yes	Limitations Act 1980	Date of incident + 12 years. In the	Secure disposal

	accident or injury in the work place			case of a serious accident a further period of retention will need to be considered and applied	
6.4	Accident reporting	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	3 years after last entry or end of investigation	Secure disposal
6.4.1	Adults	Yes		Date of the incident + 6 years	Secure disposal
6.4.2	Children	Yes		Date of birth of the child + 25 years	Secure disposal
6.5	Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)	Current year + 40 years	Secure disposal
6.6	Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	Secure disposal

6.7	Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	No	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995	Last action + 50 years	Secure disposal
6.8	Fire precautions log books	No		Current year + 6 years	Secure disposal
7. Financial Management					
7.1	Employer's liability insurance certificate	No		Closure of the school + 40 years	Secure disposal
7.1.1	Policies	No		3 years after lapse	Standard disposal
7.1.2	Claims correspondence	No		3 years after settlement	Secure disposal
7.2	Inventories	No		Current year + 6 years	Secure disposal
7.3	Burglary, theft and vandalism report forms	No	Companies Act 2006 Charities Act 2011	Current year + 6 years	Secured disposal

7.4	Annual Accounts	No	https://www.gov.uk/running-a-limited-company/company-and-accounting-records	Current year + 6 years	Standard disposal
7.5	Loans and grants managed by the school	No		Date of last payment + 12 years then review	Secure disposal
7.6	All records relating to the creation and management of budgets including the annual budget statement and background papers	Yes if details on staff remuneration is available		Life of the budget + 3 years	Secure disposal
7.7	Invoices, receipts, order books and requisitions and delivery notes	No		Current financial year + 6 years	Secure disposal
7.8	Records relating to the collection and banking of monies	No		Current financial year + 6 years	Secure disposal
7.9	Records relating to the identification	No		Current financial year + 6 years	Secure disposal

	and collection of debt				
7.10	Reconciliation of bank accounts	No	Companies Act 2006 Charities Act 2011	Current financial year + 6 years	Secure disposal
7.11	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	Secure disposal
7.12	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	Secure disposal
7.13	All records relating to the monitoring of contracts	No		Current year + 2 years	Secure disposal
7.14	Cheque books	No		Current year + 6 years	Secure disposal
7.15	Paying-in books	No		Current year + 6 years	Secure disposal
7.16	Invoices	No		Current year + 6 years	Secure disposal
7.17	Receipts	No		Current year + 6	Secure disposal

				years	
7.18	Bank statements	No		Current year + 6 years	Secure disposal
7.19	School Meals registers	Yes		Current year + 6 years	Secure disposal
7.20	Details of lettings	No		Current year + 6 years	Secure disposal
7.21	Tax and accounting records	No	Finance Act 1998 Taxes Management Act 1970	6 years from the end of the relevant tax year	Secure disposal
7.22	Information relevant for VAT purposes	No	Finance Act 1998 HMRC notices	Minimum 6 years from end of relevant period	Secure disposal
8. Property Management					
8.1	All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	Secure disposal
8.2	All records relating to the maintenance of the school carried out by school	No		Current year + 6 years	Secure disposal

	employees including maintenance log books				
9. Pupil Records					
9.1	Pupil's educational record	Yes	The Education (Pupil Information) (England) Regulations 2005 Data Protection Act 2018	Retain whilst the child attends the school	
<p>25 years from date of birth if the school is the final school of the child but the pupil file should follow the pupil so it is likely to be difficult to justify the need for retention of information once the file has been passed to the pupil's new school.</p> <p>The file should follow the pupil when he/she leaves the school. This will include: • to another primary school • to a secondary school • to a pupil referral unit.</p> <p>If the pupil dies whilst at school the file should be returned to the Local Authority to be retained for the statutory retention period.</p> <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>It is accepted that 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 - recommendation of IRMS</p>					
9.2	Parents' details or parent's details	Yes	Pupil Registration Regulations 2006 (for basic name and contact details). Otherwise usually operational in accordance with the statutory functions of the school	Usually, for the duration that the parent has a pupil at the school. Otherwise subject to case by case justification.	See 9.1 above
9.3	Past pupils (alumni & alumnae) and	Yes		For as long as necessary	

	their parents				
9.2	Examination results	Yes		Information should be added to the pupil's file.	See 9.1 above
9.3	Attendance registers	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014 Pupil Registration Regulations 2006, Regulation 14	3 years from when the register entry was made if made in paper registers For computerised registers retain until 3 years after the end of the school year during which the entry was made. This applies to every back up copy. The difference in retention periods as between manual and computerised registers has probably come about in error but this is what the Regulations say.	Secure disposal
9.4	Correspondence relating to unauthorised	Yes	Education Act 1996	Current year + 2 years	Secure disposal

	absence				
9.5	Other items e.g. curriculum related, photographs, video recordings	Possibly		Case by case	Look at what is being processed and how long it is needed. Ensure there is good justification for keeping it as long as it is. Set out the items and the justification.
9.5 Special Educational Needs					
9.5.1	SEN files, reviews and individual education plans (or the equivalent)	Yes	Limitation Act 1980	Date of birth of the pupil + 25 years	See comment below
<p>Review</p> <p>This retention period is the minimum retention period that any pupil file should be kept. Some local 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.</p>					
9.5.2	Education Health and Care Plans (or equivalent)	Yes	Limitations Act 1980 Special Educational Needs and Disability Regulations 2014	Data of birth of the pupil + 25 years	Secure disposal unless the document(s) is subject to a

			Children and families Act 2014, part 3		legal hold.
9.5.2.1	Statements of Special Educational Needs (historic)	Yes	Special Educational Needs and Disability Regulations 2001	25 years from date of birth of pupil unless passed to new school (usually on the pupil's file)	Secure disposal unless the document(s) is subject to a legal hold.
9.5.3	Advice and information provided to parents regarding educational needs.	Yes	Special Educational Needs and Disability Act 2001	Date of birth of the pupil + 25 years	Secure disposal. This information would normally be retained on the pupil file (see above)
9.5.4	Accessibility strategy	Yes	Special Educational Needs and Disability Act 2001	Date of birth of the pupil + 25 years	Secure disposal. This information would normally be retained on the pupil file (see above)
9.6	SATS records	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	Secure disposal

				whole year SATs results. These could be kept for current year + 6 years to allow suitable comparison	
9.7	Examination papers	No		The examination papers should be kept until any appeals/validation process is complete	Secure disposal
9.8	Published Admission Number (PAN) reports	Yes		Current year + 6 years	Secure disposal
9.9	Value Added and Contextual Data	Yes			
9.10	Self-Evaluation Forms (SEF)	Yes			
9.11 Curriculum					
9.11.1	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
9.11.2	Timetable	No		Current year + 1 year	
9.11.3	Class Record	No		Current year + 1	

	Books			year	further retention period or Secure disposal
9.11.4	Mark Books	No		Current year + 1 year	
9.11.5	Record of Homework set	No		Current year + 1 year	
9.11.6	Pupils' work	No		Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the school's policy then current year + 1 year	Secure disposal
9.12	Secondary Transfer information	Yes		Current year + 2 years	Secure disposal
9.13	Attendance returns	Yes		Current year + 1 year	Secure disposal
9.14	School Census returns	No		Current year + 5 years	Secure disposal
9.15	Circulars and other information received from the Local Authority	No		Operational use	Secure disposal

9.16	Ofsted reports and papers	No		Life of the report then review	Secure disposal
9.17	Returns made to central government	No		Current year + 6 years	Secure disposal
9.18	Circulars and other information sent from central government	No		Operational use	Secure disposal
10. Educational Visits					
10.1	Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Primary Schools	No	Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice"	Date of visit + 14 years	Secure disposal
10.2	Parental consent forms for the school trip where there has been no incident	Yes	Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice"	Date of visit + 10 years	Secure disposal
10.3	Parental	Yes	Limitation Act 1980	DOB of the pupil	Secure disposal

	consent forms for the school trip where there has been an incident			involved in the incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	
11 General					
11.1	Documents of clear historical / archival significance		Data Protection regulation	Permanent if relevant data protection regulation provisions are met.	
11.2	Title deeds of property belonging to the school	No		Permanent (held by the trustees)	N/A
11.3	Plans of the property, building records, consents, planning, consents, certificates and warranties etc.	No	Limitation Act 1980	Review. Most should be retained whilst the buildings and land are occupied. Otherwise 6 years afterwards.	Secure disposal

11.4	Intellectual property records and legal files re provision of service		Limitation Act 1980		Recommended: Life of service provision or IP plus 6 years
11.5	Leases		Limitation Act 1980	12 years after the lease has expired	Secure disposal

The governors accept the advice from its lawyers, Stone King, that, provided clear justification can be given for the length of time a document will be held, the school will choose how long to keep records. The governors agree that the school can amend the retention schedule accordingly and at any time on subsequent notification to the governing body or the sub-committee to which Data Protection has been delegated.

No document will be deliberately deleted or destroyed in order to avoid disclosure in response to a Subject Access Request. Such action will be subject to the school's disciplinary procedures.