

# Presdales School



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Presdales School adopts the IRMS data retention guidance for schools. With the following exception:

The Academy reserves the right to retain minimal data in relation to historical interest this may include:

Your name and date of entry to the school

Your image in whole school or group photographs

Your name and/or image in relation to a participation in a school trip or event (for example a drama production)

Your name and/or image in relation to notable achievement

# Information and Records Management Society Retention Guidelines for Schools

## Version 4

This retention schedule contains recommended retention periods for the different record series created and maintained by schools in the course of their business. The schedule refers to all information regardless of the media in which it is stored.

Some of the retention periods are governed by statute. Others are guidelines following best practice. Every effort has been made to ensure that these retention periods are compliant with the requirements of the Data Protection Act 1998 and the Freedom of Information Act 2000.

Managing record series using these retention guidelines will be deemed to be “normal processing” under the legislation mentioned above. If record series are to be kept for longer or shorter periods than laid out in this document the reasons for this need to be documented.

This schedule should be reviewed on a regular basis.

This document is a guideline only and liability is the liability of the end user and not of the IRMS.

# Records Management Toolkit for Schools

Version 4

## Retention Guidelines - Summary of Contents

<b>1 Child Protection</b>	34
Child Protection files	34
Allegation of a child protection nature against a member of staff, including where the allegation is unfounded	34
<b>2 Governors</b>	35
Minutes	35
Agendas	35
Reports	35
Annual Parents' meeting papers	35
Instruments of Government	35
Trusts and Endowments	35
Action Plans	35
Policy documents	35
Complaints files	36
Annual Reports required by the Department for Education	36
Proposals for schools to become, or be established as Specialist Status schools	36
<b>3 Management</b>	37
Log Books	37
Minutes of the Senior Management Team and other internal administrative bodies	37
Reports made by the head teacher or the management team	37
Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	37
Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	37
Professional development plans	37
School development plans	37
Admissions - if the admission is successful	37
Admissions - if the appeal is unsuccessful	37
Admissions - Secondary Schools - Casual	38
Proofs of address supplied by parents as part of the admissions process	38
Supplementary Information form including additional information such as religion, medical conditions etc	38
<b>4 Students</b>	38
Admission Registers	38
Attendance registers	39
Student Files Retained in Schools	39
Student files	39
Special Educational Needs files, reviews and Individual Education Plans	39
Correspondence Relating to Authorised Absence and Issues.	40
Examination results	40
Any other records created in the course of contact with students	40
Statement maintained under The Education Act 1996 - Section 324	40
Proposed statement or amended statement	40
Advice and information to parents regarding educational needs	40
Accessibility Strategy	40
Parental permission slips for school trips – where there has been no major incident	40
Parental permission slips for school trips – where there has been a major incident	41
Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Primary Schools	41
Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Secondary Schools	41
Walking Bus registers	41
<b>5 Curriculum</b>	42
School Development Plan	42
Curriculum returns	42
Schemes of work	42
Timetable	42

Class record books	42
Mark Books	42
Record of homework set	42
Students' work	42
Examination results	43
SATS records - Examination Papers and Results	43
PAN reports	43
Value Added & Contextual Data	43
Self-Evaluation forms	43
<b>6 Personnel Records held in Schools</b>	<b>43</b>
Timesheets, sick pay	43
Staff Personal files	43
Interview notes and recruitment records	43
Pre-employment vetting information (including CRB checks)	43
Disciplinary proceedings:	43
Records relating to accident/injury at work	44
Annual appraisal/assessment records	44
Salary cards	44
Maternity pay records	44
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	44
Proofs of identity collected as part of the process of checking "portable" enhanced CRB disclosure	45
<b>7 Health and Safety</b>	<b>45</b>
Accessibility Plans	45
Accident Reporting	45
COSHH	45
Incident reports	45
Policy Statements	46
Risk Assessments	46
Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	46
Process of monitoring of areas where employees and persons are likely to have come in contact with radiation	46
Fire Precautions log books	46
<b>8 Administrative</b>	<b>46</b>
Employer's Liability certificate	46
Inventories of equipment and furniture	46
General file series	46
School brochure or prospectus	46
Circulars (staff/parents/students)	46
Newsletters, ephemera	47
Visitors book	47
PTA/Old Students Associations	47
<b>9 Finance</b>	<b>47</b>
Annual Accounts	47
Loans and grants	47
Contracts	47
Copy orders	47
Budget reports, budget monitoring etc.	47
Invoice, receipts and other records covered by the Financial Regulations	48
Annual Budget and background papers	48
Order books and requisitions	48
Delivery Documentation	48
Debtors' Records	48
School Fund - Cheque books	48
School Fund - Paying in books	48
School Fund - Ledger	48
School Fund - Invoices	48
School Fund - Receipts	48
School Fund - Bank statements	48

School Fund - School Journey books	48
Student grant applications	48
Free schoolmeals register	48
Petty cash books	48
<b>10 Property</b>	<b>49</b>
Title Deeds	49
Plans	49
Maintenance and contractors	49
Leases	49
Lettings	49
Burglary, theft and vandalism report forms	49
Maintenance log books	49
Contractors' Reports	49
<b>11 Local Authority</b>	<b>49</b>
Secondary transfer sheets (Primary)	49
Attendance returns	49
Circulars from LEA	49
<b>12 Department for Children, Schools and Families</b>	<b>50</b>
HMI reports	50
OFSTED reports and papers	50
Returns	50
Circulars from Department for Children, Schools and Families	50
<b>13 Connexions</b>	<b>50</b>
Service level agreements	50
Work Experience agreement	50
<b>14 Schools Meals</b>	<b>50</b>
Dinner Register	50
School Meals Summary Sheets	50
<b>15 Family Liaison Officers and Home School Liaison Assistants</b>	<b>51</b>
Day Books	51
Reports for outside agencies - where the report has been included on the case file created by the outside agency	51
Referral forms	51
Contact data sheets	51
Contact database entries	51
Group Registers	51

1. ChildProtection					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
1.1	Child Protection files	Yes	Education Act 2002, s175, related guidance "Safeguarding Children in Education", September 2004	DOB + 25 years <sup>1</sup>	SECURE DISPOSAL
1.2	Allegation of a child protection nature against a member of staff, including where the allegation is unfounded	Yes	Employment Practices Code: Supplementary Guidance 2.13.1 (Records of Disciplinary and Grievance) Education Act 2002 guidance "Dealing with Allegations of Abuse against Teachers and Other Staff" November 2005	Until the person's normal retirement age, or 10 years from the date of the allegation whichever is the longer	SECURE DISPOSAL

<sup>1</sup> This amendment has been made in consultation with the Safeguarding Children Group.

<sup>2</sup> From January 1st 2005 subject access is permitted into unstructured filing systems and log books and other records created within the school containing details about the activities of individual students and members of staff will become subject to the Data Protection Act 1998.



2. Governors					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
2.1	Minutes				
	• Principal set (signed)	No		Permanent	Retain in school for 6 years from date of meeting
	• Inspection copies	No		Date of meeting + 3 years	SECURE DISPOSAL [If these minutes contain any sensitive personal information they should be shredded]
2.2	Agendas	No		Date of meeting	SECURE DISPOSAL
2.3	Reports	No		Date of report + 6 years	Retain in school for 6 years from date of meeting
2.4	Annual Parents' meeting papers	No		Date of report + 6 years	Retain in school for 6 years from date of meeting
2.5	Instruments of Government	No		Permanent	Retain in school whilst school is open
2.6	Trusts and Endowments	No		Permanent	Retain in school whilst operationally required
2.7	Action Plans	No		Date of action plan + 3 years	SECURE DISPOSAL
2.8	Policy documents	No		Expiry of policy	Retain in school whilst policy is operational (this includes if the expired policy is part of a past decision making process)

2. Governors					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
2.9	Complaints files	Yes		Date of resolution of complaint + 6 years	Retain in school for the first six years Review for further retention in the case of contentious disputes SECURE DISPOSAL routine complaints
2.10	Annual Reports required by the Department for Education	No	Education (Governors' Annual Reports) (England)(Amendment) Regulations 2002.SI 2002 No 1171	Date of report + 10 years	
2.11	Proposals for schools to become, or be established as Specialist Status schools	No			Current year + 3 years

3. Management					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
3.1	Log Books	Yes		Date of last entry in the book + 6 years	Retain in the school for 6 years from the date of the last entry
3.2	Minutes of the Senior Management Team and other internal administrative bodies	Yes		Date of meeting + 5 years	Retain in the school for 5 years from meeting
3.3	Reports made by the head teacher or the management team	Yes		Date of report + 3 years	Retain in the school for 3 years from meeting
3.4	Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	Yes		Closure of file + 6 years	SECURE DISPOSAL
3.5	Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	No		Date of correspondence + 3 years	SECURE DISPOSAL
3.6	Professional development plans	Yes		Closure + 6 years	SECURE DISPOSAL
3.7	School development plans	Yes		Closure + 6 years	Review
3.8	Admissions - if the admission is successful	Yes		Admission + 1 year	SECURE DISPOSAL
3.9	Admissions - if the appeal is unsuccessful	Yes		Resolution of case + 1 year	SECURE DISPOSAL

3. Management					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
3.10	Admissions - Secondary Schools - Casual	Yes		Current year + 1 year	SECURE DISPOSAL
3.11	Proofs of address supplied by parents as part of the admissions process	Yes		Current year + 1 year	SECURE DISPOSAL
3.12	Supplementary Information form including additional information such as religion, medical conditions etc.				

4. Students					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
4.1	Admission Registers	Yes		Date of last entry in the book (or file) + 6 years Reconsider Retention Period. Feedback from Teaching Relative was thought to be 7 Year Retention. These records are no longer generated in paper but electronically held using SIMS BROCON software.	Retain in the school for 6 years from the date of the last entry then consider transfer to the Archives
4.2	Attendance registers	Yes		Date of register + 3 years	SECURE DISPOSAL [If these records are retained electronically any backup copies should be destroyed at the same time]

	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
4.3	Student Files Retained in Schools	Yes			
4.3a	• Primary			Retain for the time which the student remains at the primary school	Transfer to the secondary school (or other primary school) when the child leaves the School. In the case of exclusion it may be appropriate to transfer the record to the Student Referral Unit
4.3b	• Secondary		Limitation Act 1980	DOB of the student + 25 years <sup>3</sup>	SECURE DISPOSAL
4.4	Student files	Yes			
4.4a	• Primary			Retain for the time which the student remains at the primary school	Transfer to the secondary school (or other primary school) when the child leaves the School. In the case of exclusion it may be appropriate to transfer the record to the Student Referral Unit
4.4b	• Secondary		Limitation Act 1980	DOB of the student + 25 years <sup>4</sup>	SECURE DISPOSAL
4.5	Special Educational Needs files, reviews and Individual Education Plans	Yes		DOB of the student + 25 years the review NOTE: This retention period is the minimum period that any student file should be kept. Some authorities choose to keep SEN files for a longer period of time to defend themselves in a “failure to provide a sufficient education ”case. There is an element of business risk analysis involved in any decision to kept he records longer than the minimum retention period.	SECURE DISPOSAL

<sup>3</sup> If these records are retained on the student file or in their National Record of Achievement they need only be kept for as long as operationally necessary.

<sup>4</sup> As above

4. Students					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
4.6	Correspondence Relating to Authorised Absence and Issues	No		Date of absence + 2 years	SECURE DISPOSAL
4.7	Examination results	Yes			
4.7a	• Public	No		Year of examinations + 6 years	SECURE DISPOSAL
4.7b	• Internal examination results	Yes		Current year + 5 years <sup>5</sup>	SECURE DISPOSAL
4.8	Any other records created in the Course of contact with students	Yes/No		Current year + 3 years	Review at the end of 3 years and either allocate a further retention period or SECURE DISPOSAL
4.9	Statement maintained under The Education Act 1996- Section 324	Yes	Special Educational Needs and Disability Act 2001 Section 1	DOB + 30 years	SECURE DISPOSAL unless legal action is pending
4.10	Proposed statement or amended statement	Yes	Special Educational Needs and Disability Act 2001 Section 1	DOB + 30 years	SECURE DISPOSAL unless legal action is pending
4.11	Advice and information to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Closure + 12 years	SECURE DISPOSAL unless legal action is pending
4.12	Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Closure + 12 years	SECURE DISPOSAL unless legal action is pending
4.13	Parental permission slips for school trips - where there has been no major incident	Yes		Conclusion of the trip	SECURE DISPOSAL

<sup>5</sup> If these records are retained on the student file or in their National Record of Achievement they need only be kept for as long as operationally necessary.

4. Students					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
4.14	Parental permissionslips for schooltrips- wherethere has been a major incident	Yes	Limitation Act 1980	DOB of the student involved in the incident + 25 years The permission slips for all students on the trip need to be retained to show that the rules had been followed for all students	SECURE DISPOSAL
4.15	Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Primary Schools	No	3 part supplement to the Health & Safety of Students on Educational Visits (HASPEV) (1998).	Date of visit + 14 years <sup>6</sup>	N
4.16	Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Secondary Schools	No	3 part supplement to the Health & Safety of Students on Educational Visits (HASPEV) (1998).	Date of visit + 10 years	N
4.17	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 backup copies should be destroyed at the same time]

<sup>6</sup> This retention period has been set in agreement with the Safeguarding Children's Officer.



5. Curriculum					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
5.1	School Development Plan	No		Current year + 6 years	SECURE DISPOSAL
5.2	Curriculum returns	No		Current year + 3 years	SECURE DISPOSAL
5.3	Schemes ofwork	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
5.4	Timetable	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
5.5	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 new retention period or SECURE DISPOSAL
5.6	Mark Books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL
5.7	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 new retention period or SECURE DISPOSAL
5.8	Students' work	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or SECURE DISPOSAL

5. Curriculum					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
5.9	Examination results	Yes		Current year + 6 years	SECURE DISPOSAL
5.10	SATS records - Examination Papers and Results	Yes		Current year + 6 years	SECURE DISPOSAL
5.11	PAN reports	Yes		Current year + 6 years	SECURE DISPOSAL
5.12	Value Added & Contextual Data	Yes		Current year + 6 years	SECURE DISPOSAL
5.13	Self-Evaluation forms	Yes		Current year + 6 years	SECURE DISPOSAL

6. Personnel Records held in Schools					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
6.1	Timesheets, sick pay	Yes	Financial Regulations	Current year + 6 years	SECURE DISPOSAL
6.2	Staff Personal files	Yes		Termination + 7 years	SECURE DISPOSAL
6.3	Interview notes and recruitment records	Yes		Date of interview + 6 months	SECURE DISPOSAL
6.4	Pre-employment vetting information (including CRB checks)	No	CRB guidelines	Date of check + 6 months	SECURE DISPOSAL [by the designated member of staff]
6.5	Disciplinary proceedings:	Yes	Where the warning relates to child protection issues see 1.2. If the disciplinary proceedings relate to a child protection matter please contact your safeguarding children officer for further advice.		

6. Personnel Records held in Schools					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
6.5a	• oral warning			Date of warning + 6 months	SECURE DISPOSAL <sup>7</sup>
6.5b	• written warning - level one			Date of warning + 6 months	SECURE DISPOSAL
6.5c	• written warning - level two			Date of warning + 12 months	SECURE DISPOSAL
6.5d	• final warning			Date of warning + 18 months	SECURE DISPOSAL
6.5e	• case notfound			If child protection related please see 1.2 otherwise SECURE DISPOSAL immediately at the conclusion of the case	SECURE DISPOSAL
6.6	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
6.7	Annual appraisal/assessment records	No		Current year + 5 years	SECURE DISPOSAL
6.8	Salary cards	Yes		Last date of employment + 85 years	SECURE DISPOSAL
6.9	Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567)	Current year +3yrs	SECURE DISPOSAL
6.10	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL

<sup>7</sup> If this is placed on a personal file it must be weeded from the file.

6. Personnel Records held in Schools					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
6.11	Proofs of identity collected as part of the process of checking "portable" enhanced CRB 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.	

Comment: CRB Guidelines all falls under the heading of Data Recruitment Polices. Consideration needs to be applied to adding a separate category maybe.

7. Health and Safety					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
7.1	Accessibility Plans		Disability Discrimination Act	Current year + 6 years	SECURE DISPOSAL
7.2	Accident Reporting		Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980		
7.2a	• Adults	Yes		Date of incident + 7 years	SECURE DISPOSAL
7.2b	• Children	Yes		DOB of child + 25 years <sup>8</sup>	SECURE DISPOSAL
7.3	COSHH			Current year + 10 years [where appropriate an additional retention period may be allocated]	
7.4	Incident reports	Yes		Current year + 20 years	SECURE DISPOSAL

<sup>8</sup> A child may make a claim for negligence for 7 years from their 18th birthday. To ensure that all records are kept until the student reaches the age of 25 this retention period has been applied.

7. Health and Safety					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
7.5	Policy Statements			Date of expiry + 1 year	SECURE DISPOSAL
7.6	Risk Assessments	Yes		Current year + 3 years	SECURE DISPOSAL
7.7	Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos			Last action + 40 years	SECURE DISPOSAL
7.8	Process of monitoring of areas where employees and persons are likely to have come in contact with radiation			Last action + 50 years	SECURE DISPOSAL
7.9	Fire Precautions log books			Current year + 6 years	SECURE DISPOSAL

8. Administrative					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
8.1	Employer's Liability certificate			Closure of the school + 40 years	SECURE DISPOSAL
8.2	Inventories of equipment & furniture			Current year + 6 years	SECURE DISPOSAL
8.3	General file series			Current year + 5 years	Review to see whether a further retention period is required
8.4	School brochure or prospectus			Current year + 3 years	
8.5	Circulars (staff/parents/students)			Current year + 1 year	SECURE DISPOSAL

8. Administrative					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
8.6	Newsletters, ephemera			Current year + 1 year	Review to see whether a further retention period is required
8.7	Visitors book			Current year + 2 years	Review to see whether a further retention period is required
8.8	PTA/Old Students Associations			Current year + 6 years	Review to see whether a further retention period is required

9. Finance					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
9.1	Annual Accounts		Financial Regulations	Current year + 6 years	
9.2	Loans and grants		Financial Regulations	Date of last payment on loan + 12 years	Review to see whether a further retention period is required
9.3	Contracts				
9.3a	• under seal			Contract completion date + 12 years	SECURE DISPOSAL
9.3b	• under signature			Contract completion date + 6 years	SECURE DISPOSAL
9.3c	• monitoring records			Current year + 2 years	SECURE DISPOSAL
9.4	Copy orders			Current year + 2 years	SECURE DISPOSAL
9.5	Budget reports, budget monitoring etc.			Current year + 3 years	SECURE DISPOSAL

9. Finance					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
9.6	Invoice, receipts and other records covered by the Financial Regulations		Financial Regulations	Current year + 6 years	SECURE DISPOSAL
9.7	Annual Budget and background papers			Current year + 6 years	SECURE DISPOSAL
9.8	Order books and requisitions			Current year + 6 years	SECURE DISPOSAL
9.9	Delivery Documentation			Current year + 6 years	SECURE DISPOSAL
9.10	Debtors' Records		Limitation Act 1980	Current year + 6 years	SECURE DISPOSAL
9.11	School Fund - Cheque books			Current year + 3 years	SECURE DISPOSAL
9.12	School Fund - Paying in books			Current year + 6 years then review	SECURE DISPOSAL
9.13	School Fund - Ledger			Current year + 6 years then review	SECURE DISPOSAL
9.14	School Fund- Invoices			Current year + 6 years then review	SECURE DISPOSAL
9.15	School Fund - Receipts			Current year + 6 years	SECURE DISPOSAL
9.16	School Fund - Bank statements			Current year + 6 years then review	SECURE DISPOSAL
9.17	School Fund - School Journey books			Current year + 6 years then review	SECURE DISPOSAL
9.18	Student grant applications			Current year + 3 years	SECURE DISPOSAL
9.19	Free school meals registers	Yes		Current year + 6 years	SECURE DISPOSAL
9.20	Petty cash books			Current year + 6 years	SECURE DISPOSAL

10. Property					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
10.1	Title Deeds			Permanent	Permanent, these should follow the property unless the property has been registered at the Land Registry
10.2	Plans			Permanent	Retain in school whilst operational
10.3	Maintenance and contractors		Financial Regulations	Current year + 6 years	SECURE DISPOSAL
10.4	Leases			Expiry of lease + 6 years	SECURE DISPOSAL
10.5	Lettings			Current year + 3 years	SECURE DISPOSAL
10.6	Burglary, theft and vandalism report forms			Current year + 6 years	SECURE DISPOSAL
10.7	Maintenance log books			Current year + 6 years	SECURE DISPOSAL
10.8	Contractors' Reports			Current year + 6 years	SECURE DISPOSAL

11. Local Authority					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
11.1	Secondary transfer sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
11.2	Attendance returns	Yes		Current year + 1 year	SECURE DISPOSAL
11.3	Circulars from LEA			Whilst required operationally	Review to see whether a further retention period is required



12. Department for Children, Schools and Families					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
12.1	HMI reports			These do not need to be kept any longer	
12.2	OFSTED reports and papers			Replace former report with any new inspection report	Review to see whether a further retention period is required
12.3	Returns			Current year + 6 years	SECURE DISPOSAL
12.4	Circulars from Department for Children, Schools and Families			Whilst operationally required	Review to see whether a further retention period is required

13. Connexions					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
13.1	Service level agreements			Until superseded	SECURE DISPOSAL
13.2	Work Experience agreement			DOB of child + 18 years	SECURE DISPOSAL

Are KPI's required? Consideration required as to whether this new item should be included.

14. Schools Meals					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
14.1	Dinner Register			Current year + 3 years	SECURE DISPOSAL
14.2	School Meals Summary Sheets			Current year + 3 years	SECURE DISPOSAL

15. Family Liaison Officers and Home School Liaison Assistants					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
15.1	Day Books	Yes		Current year + 2 years then review	SECURE DISPOSAL
15.2	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 the school then destroy	SECURE DISPOSAL
15.3	Referral forms	Yes		While the referral is current	SECURE DISPOSAL
15.4	Contact datasheets	Yes		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL
15.5	Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	DELETE
15.6	Group Registers	Yes		Current year + 2 years	SECURE DISPOSAL

