

Record Retention Schedule

1 Governance, Funding and Financial Management

1.1 Governance of the trust

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
1.1.1	Governance Statement	No		Life of statement + 6 years	Secure disposal	Trust
1.1.2	Articles of Association	No		Life of the trust		Trust
1.1.3	Memorandum of understanding	No	Companies Act 2006 section 355	Lie of the Memorandum + 6 years	Secure disposal	Trust
1.1.4	Special resolutions to amend the constitution	No		Life of the academy		Trust
1.1.5	Scheme of Delegation	No	Companies Act 2006 section 355	Life of the Scheme + 10 years	Secure disposal	Trust
1.1.6	Appointment of Trustees and Governors	Yes		Life of appointment + 6 years	Secure disposal	Trust (trustees) School (governors)
1.1.7	Disqualification of Trustees and Governors	Yes	Company Directors Disqualification Act 1986	Date of disqualification + 15 years	Secure disposal	Trust (trustees) School (governors)
1.1.8	Annual Report and Accounts	No	Companies Act 2006 section 355	Date of report + 10 years	Secure disposal	Trust
1.1.10	Appointment and Removal of Members	Yes		Life of appointment + 3 years	Secure disposal	Trust
1.1.11	Strategic Review and School Development Plan	No		Date of review/plan + 6 years	Secure disposal	Trust & School

Record Retention Schedule

1.2 Board of Trustees, Members and Local Governing Body Meetings

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	Trustees					
1.2.1	Board Meetings minutes	Yes – where living individuals are referred to	Companies Act 2006 section 248	Date of meeting + 3years	Offer to archives	Trust
1.2.2	Board decisions	Yes – where living individuals are referred to		As above	As above	Trust
1.2.3	Annual planners	No		Current year	Secure disposal	Trust
	Local Governing Body/Committees					
1.2.4	Meeting Minutes/Agendas	Yes – where living individuals are referred to		Date of meeting + 3 years	Offer to archives or dispose	School
1.2.5	Committee minutes	Yes – where living individuals are referred to		As above	Offer to archives	School
1.2.6	LGB inspection copy minutes			Date of meeting + 3 years	Secure disposal	School
1.2.7	Reports presented to the local governing body	Possibly, where living individuals are referred to		Date of report + 3 years	Secure disposal	School
1.2.8	Complaints dealt with by the Trustees or local governing body	Yes		Date of resolution of the complaint + a minimum of 3 years then review for further retention in case of contentious disputes	Secure disposal	Trust (central) School (local)

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	Statutory Registers					
1.2.9	Register of Trustees, Members, Secretaries & Governors		Companies Act	Life of Trust + 6 years	Secure disposal	Trust
1.2.10	Register of gifts, hospitality and entertainments		Companies Act	Life of Trust + 6 years	Secure disposal	Trust (central) School (local)

1.3 Funding and Finance

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	Strategic Finance					
1.3.1	Statement of financial activities & planning	No		Current financial year + 6 years	Secure disposal	Trust
1.3.2	VFM statement	No		As above	Secure disposal	Trust
1.3.3	VAT management	No		As above	Secure disposal	Trust
1.3.4	Whole of government accounts returns	No		As above	Secure disposal	Trust
1.3.5	Borrowing powers	No		As above	Secure disposal	Trust
1.3.6	Budget plan	No		As above	Secure disposal	Trust
1.3.7	Charging and Remissions policy	No		Date policy superseded + 3 years	Secure disposal	Trust

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	Audit Arrangements					
1.3.8	Audit & Risk Committee and appointment of responsible officers	No		Financial year + 6 years	Secure disposal	Trust
1.3.9	Independent Auditor's report on regularity and financial statements	No		Financial year report relates to + 6 years	Secure disposal	Trust
	Funding Agreements					
1.3.10	Funding Agreement with the Secretary of State, Termination of Funding Agreement and SFAs	No		Date of last payment of funding + 6 years	Secure disposal	Trust
1.3.11	Capital Grants, GAG, Per Pupil and all other funding records	No		Date of last payment of funding + 6 years	Secure disposal	Trust
1.3.12	Exclusions agreement	No		As above	Secure disposal	Trust
	Strategic Finance					
1.3.13	Gift Aid and Tax Relief	No		Current financial year + 6 years	Secure disposal	Trust
1.3.14	Loans records	No		Date of last payment on loan + 6 years if the loan is under £10k or date of last payment on loan + 12 years if the loan is over £10k	Secure disposal	Trust

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
Payroll and Pensions						
1.3.15	Maternity pay records	Yes	Statutory Maternity Pay Regulations	Current year + 3 years	Secure disposal	Trust
1.3.16	Retirement Benefit Scheme records	Yes	Regulation 15 Retirement Benefits Schemes Regulations 1995	From the end of the year in which the accounts are signed for a minimum of 6 years	Secure disposal	Trust
1.3.17	Management of the Teachers' Pension Scheme	Yes		Date of last payment on the pension + 6 years	Secure disposal	Trust
1.3.18	Pensions registration records	Yes		As above	Secure disposal	Trust
1.3.19	Payroll records	Yes		As above	Secure disposal	Trust
Risk Management and Insurance						
1.3.20	Insurance policies	No		Date policy expires + 6 years	Secure disposal	Trust
1.3.21	Insurance claims	No		Date claim settled + 6 years	Secure disposal	Trust & School
1.3.22	Employer's Liability Insurance Certificate	No		Closure of the Trust/School + 40 years	Secure disposal	Trust & School
Endowment Funds and Investments						
1.3.23	Investment policies	No		Life of the investment + 6 years	Secure disposal	Trust
1.3.24	Endowment Funds	No		Life of the fund + 6 years	Secure disposal	Trust

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	Accounts and Statements					
1.3.25	Annual accounts	No		Current year + 6 years	Standard disposal	Trust
1.3.26	Loans and grants managed by schools or trust	No		Date of last payment on the loan + 12 years then review retention	Secure disposal	Trust
1.3.27	Student grant applications	Yes		Current year + 3 years	Secure disposal	School
1.3.28	All records regarding creation and management of budgets, including annual budget statement and background papers	No		Life of budget + 3 years	Secure disposal	Trust
1.3.29	Invoices, receipts, order requisitions, delivery notices	No		Current financial year + 6 years	Secure disposal	Trust
1.3.30	Records relating to collection and banking of monies, including any debt collection	No		As above	Secure disposal	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	Contract Management					
1.3.31	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	Secure disposal	Trust
1.3.32	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	Secure disposal	Trust
1.3.33	Contract monitoring records	No		Current year + 2 years	Secure disposal	Trust
	Asset Management					
1.3.34	Inventories	No		Current year + 6 years	Secure disposal	School
1.3.35	Burglary, theft & vandalism reports	No		Current year + 6 years	Secure disposal	School
1.3.36	Facilities leasing records	No		Current year + 6 years	Secure disposal	School
1.3.37	Land and building valuations	No		Date of valuation superseded + 6 years	Secure disposal	Trust
1.3.38	Asset disposals	No		Date of asset disposed of + 6 years	Secure disposal	Trust
1.3.39	Land leases	No		Date lease expires + 6 years	Secure disposal	Trust
1.3.40	Commercial transfer arrangements	No		Date of transfer + 6 years	Secure disposal	Trust
1.3.41	Transfer of freehold land	No		Life of land ownership then transfer to new owner	Secure disposal	Trust
	School fund					
1.3.42	All areas	No		Current year + 6 years	Secure disposal	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
	School meals					
1.3.43	FSM registers	Yes		Current year + 6 years	Secure disposal	School
1.3.44	School meal registers/summaries	Yes		Current year + 3 years	Secure disposal	School

1.4 Policies, Frameworks and Overarching Requirements

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
1.4.1	Data Protection & FOI policies & breaches	No		Date policy superseded + 6 years	Secure disposal	Trust (policies) Trust (breaches)
1.4.2	SEND policy	No		As above	Secure disposal	Trust
1.4.3	Complaints policy	No		As above	Secure disposal	Trust
1.4.4	Risk assessments	No		Life of document + 6 years	Secure disposal	Trust (central) School (local)
1.4.5	Home school agreements	No		Date agreement revised + 6 years	Secure disposal	School
1.4.6	Equality information / objectives	No		Date of statement + 6 years	Secure disposal	School

Record Retention Schedule

2 Human Resources

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
2.1	Recruitment					
2.1.1	All records leading up to the appointment of a new CEO, Director or Head Teacher	Yes		Date of appointment + 6 years	Secure disposal	Trust
2.1.2	All records leading up to the appointment of a new member of staff - unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	Secure disposal	Trust & school
2.1.3	All records leading up to the appointment of a new member of staff – successful candidate	Yes		All relevant information should be added to the Staff Personal file (see below) and all other information retained for 6 months	Secure disposal	Trust & school
2.1.4	Pre-employment vetting - DBS checks	Yes	DBS Update Service Employer Guide June 2014	Ask for a copy for staff personal file when it is shown	Secure disposal	School
2.1.5	Proof of identity collected as part of the process of checking 'portable' enhanced DBS disclosure	Yes		Check and keep note of what was seen/checked. Keep copy for staff personal file.	Secure disposal	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
2.1.6	Pre-employment vetting information – Evidence proving the right to work in the UK	Yes	An employer's guide to right to work checks (Home Office May 2015)	The Home Office requires that the documents are kept for termination of employment + not less than 2 years	Secure disposal	School
2.1.7	Records relating to employment of overseas teachers	Yes		As above	Secure disposal	School
2.1.8	Records relating to the TUPE process	Yes		Date last member of staff transfers or leaves the organisation + 6 years	Secure disposal	Trust
2.2	Operational staff management					
2.2.1	Staff personal file (including contract and staff training records)	Yes	Limitation Act 1980 (Section 2)	Termination of employment + 6 years	Secure disposal	Trust (central) School (local)
2.2.2	Timesheets	Yes		Current year + 6 years	Secure disposal	Trust (central) School (local)
2.2.3	Appraisal/assessment records	Yes		Current year + 5 years	Secure disposal	Trust (central) School (local)
2.2.4	Records relating to the agreement of pay and conditions	No		Date pay and conditions superseded + 6 years	Secure disposal	Trust (central) School (local)
2.2.5	Training needs analysis	No		Current year + 1 year	Secure disposal	Trust (central) School (local)

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
2.3	Management of Disciplinary and Grievance Processes					
2.3.1	Allegation which is child protection in nature against a member of staff, included where the allegation is unfounded	Yes	KCSiE statutory DFE guidance, Working together to Safeguard Children, A guide to inter-agency working to safeguard and promote the welfare of children.	Until the person's normal retirement age or 10 years from the date of the allegation, whichever is the longer, then review	Secure disposal – ensure these documents are shredded	Trust (central) School (local)
2.3.2	Disciplinary proceedings: <ul style="list-style-type: none"> • Formal counselling • Written warning and final written warning • Dismissal (where there is no child protection issue) • Dismissal (child protection in nature) 	Yes Yes Yes Yes	As above	Date of meeting + 6 months Date warning expires + 6 months Date of dismissal + 6 years Until the person's normal retirement age or 10 years from the date of the allegation, whichever is the longer, then review	Secure disposal Secure disposal Secure disposal Secure disposal – ensure these documents are shredded	Trust (central) School (local)

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
2.4	Health and Safety					
2.4.1	H & S policy	No		Life of policy + 3 years	Secure disposal	Trust
2.4.2	H & S risk assessments	No		Life of RA +3 years	Secure disposal	Trust (central) School (local)
2.4.3	Accident/injury at work records	Yes		Date of incident + 12 years. In the case of serious incidents, a further retention period will need to be applied	Secure disposal	Trust (central) School (local)
2.4.4.	Accident reporting <ul style="list-style-type: none"> • Adults • Children 	Yes	Social Security (Claims & Payments) regulations 1979 reg. 25. Social Security Administration Act 1992 section 8. Limitation Act 1980	The official accident book must be retained for 3 years after the last entry in the book. The book may be in paper or electronic format. The incident reporting form may be retained as below Date of incident + 6 years Date of birth + 25 years	Secure disposal	Trust (central) School (local)
2.4.5	Control of substances hazardous to health (COSHH)	No		Current year + 10 years then review	Secure disposal	School
2.4.6	Asbestos monitoring process where employees/persons are likely to have come into contact with asbestos	No		Last action + 40 years	Secure disposal	Trust (central) School (local)

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
2.4.7	Radiation monitoring process where employees/persons are likely to have come into contact with radiation	No		Last action + 50 years	Secure disposal	Trust (central) School (local)
2.4.8	Fire precaution log book	No		Current year + 6 years	Secure disposal	Trust (central) School (local)
2.4.9	Fire risk assessment	No	Fire service order 2005	Life of risk assessment + 6 years	Secure disposal	Trust (central) School (local)
2.4.10	Incident report	Yes		Current year + 20 years	Secure disposal	Trust (central) School (local)

3 Management of the school

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
3.1	Admissions					
3.1.1	All records relating to the creation and implementation of the school admissions policy	No	School Admissions & Appeals Codes statutory guidance for admissions authorities, schools' adjudicator and admissions appeals panels	Life of policy + 3 years then review	Secure disposal	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
3.1.2	Admissions (if the admission is successful)	Yes	As above	Date of admissions + 1 year	Secure disposal	School
3.1.3	Admissions (if the appeal is unsuccessful)	Yes	As above	Resolution of case + 1 year	Secure disposal	School
3.1.4	Register of admissions	Yes	School Attendance: DFE advice for academies	Every entry in the admissions register must be preserved for a period of 3 years after the date on which the entry was made	Review – schools may wish to consider keeping the admissions register permanently, as often schools receive enquiries from past pupils to confirm the dates they attended the school	School
3.1.5	Admissions (secondary school – casual)	Yes		Current year + 1 year	Secure disposal	School
3.1.6	Proofs of address supplied	Yes	Schools Admissions Code	Current year + 1 year	Secure disposal	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
3.1.7	Supplementary information incl. additional information such as religion and medical conditions <ul style="list-style-type: none"> For successful admissions For unsuccessful admissions 	Yes		Add to pupil file Until appeals process completes	Secure disposal Secure disposal	School
3.2	Head teacher and senior management					
3.2.1	Logbooks of activity in the school maintained by the head teacher	Possible data protection issues if information refers to individual pupils or staff		Date of last entry in the book + a minimum of 6 years then review	These could be of permanent historic value and should be offered to archives, if appropriate	School
3.2.2	Minutes of senior management team meetings and other internal administrative bodies	As above		Date of the meeting + 3 years then review	Secure disposal	School
3.2.3	Head teacher and senior management reports	As above		As above	Secure disposal	School
3.2.4	Records created by head teacher, deputy heads, heads of year and other members of staff with admin responsibilities	As above		Current academic year + 6 years then review	Secure disposal	School
3.2.5	Correspondence created by head teacher, deputy heads, heads of year and other members of staff with admin responsibilities	As above		Date of correspondence + 3 years then review	Secure disposal	School
3.2.6	Professional development plans	Yes		Life of plan + 6 years	Secure disposal	

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
3.3	Operational Administration					
3.3.1	Management of Complaints	Yes		Date complaint resolved + 3 years	Secure disposal	School
3.3.2	Records relating to the management of contracts with external providers	No		Date of last payment on contract + 6 years	Secure disposal	School and/or Trust
3.3.3	Software licence records	No		Date licence expires + 6 years	Secure disposal	School
3.3.4	General file series	No		Current year + 5 years then review	Secure disposal	School
3.3.5	Records relating to the creation and publication of school brochure/publication	No		Current year + 3 years	Standard disposal	School
3.3.6	Circulars to staff, parents and pupils	No		Current year + 1 year	Standard disposal	School
3.3.7	Newsletters	No		Current year + 1 year	Standard disposal	School
3.3.8	Visitors record book/signing in sheets	Yes		Current year + 6 years then review	Secure disposal	School
3.3.9	PTA or Old Pupils Associations	No		Current year + 6 years then review	Secure disposal	School

Record Retention Schedule

4 Property Management

This section covers the management of building and property.

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
4.1	Property Management					
4.1.1	Title deeds	No		These should follow the property, unless the property has been registered with the Land Registry		Trust
4.1.2	Plans of property belonging to the school	No		These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold		Trust
4.1.3	Leases of property leased by or to the school	No		Expiry of lease + 6 years	Secure disposal	Trust
4.1.4	Records relating to the letting of school premises	No		Current financial year + 6 years	Secure disposal	School
4.1.5	Business continuity and disaster recovery plans	No		Date the plan superseded + 3 years	Secure disposal	Trust (central) School (local)
4.2	Maintenance					
4.2.1	Records of works carried out by contractors	No		Current year + 6 years	Secure disposal	Trust
4.2.2	Records of works carried out by employees	No		Current year +6 years	Secure disposal	Trust

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
4.3	Fleet Management					
4.3.1	Process of acquisition/disposal of vehicles through lease or purchase	No	Limitation Act 1980 (Section 2)	Disposal of the vehicle + 6 years	Secure disposal	Trust
4.3.2	Vehicle maintenance management record/service log/GPS tracking	No	As above	As above	Secure disposal	School

Record Retention Schedule

5 Pupil Management

This section includes all records which are created during the time a pupil spends at the school. For information about accident reporting, see under Health and Safety above.

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
5.1	Pupil Education Record					
5.1.1	Pupil educational record <ul style="list-style-type: none"> • Primary 	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 to another primary, secondary or PRU. If a pupil dies whilst at the school, return file to LA for statutory retention period. If a pupil transfers to an independent school, or home schooling or leaves the country, the file should be returned to the LA.	School
	<ul style="list-style-type: none"> • Secondary 		Limitation Act 1980	Birth of the pupil + 25 years	Secure disposal	School
5.1.2	Exclusions records	Yes		Date of birth of the pupil involved + 25 years	Secure disposal	School
5.1.3	Examination registrations	Yes		The exam board will usually mandate how long these records need to be retained		School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
5.1.4	Examinations results (pupil copies) <ul style="list-style-type: none"> Public Internal 	Yes		This information should be added to the pupil file As above	All uncollected certificates should be returned to the exam board	School
The following information may be subject to change once the Independent Inquiry on Historical Sexual Abuse reviews are complete. Retention periods relating to allegations made against adults can be found under 'Human Resources' section.						
5.1.5	Child protection information held on a pupil file	Yes	KCSiE statutory guidance. Working together to safeguard children guide	Information should be in sealed envelope and placed on pupil file and retained for the same period of time as the pupil file	Secure disposal – these records MUST be shredded	School
5.1.6	Child protection information held in separate file	Yes	As above	Date of birth of pupil _ 25 years then review. This retention period is on the understanding that the principal copy of this information will be found on the LA Social Services record	Secure disposal – these records MUST be shredded	School
5.1.7	Accessibility plan	Yes		Life of individual pupil's plan + 6 years	Secure disposal	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
5.2	Attendance					
5.2.1	Attendance registers	Yes	School Attendance DfE publication	Every entry must be preserved for a period of 3 years after the date on which the entry was made	Secure disposal	School
5.2.2	Correspondence relating to authorised absence		Education Act 1996 section 7	Current academic year + 2 years	Secure disposal	School
5.3	Special Educational Needs					
5.3.1	SEND files, reviews and IEPs	Yes	Limitation Act 1980 section 2	Date of birth of pupil + 25 years	This is minimum retention period. Some authorities may choose to keep SEND files for longer to defend in a 'failure to provide sufficient education' case. Some element of business risk analysis involved in any decision to keep records longer than the minimum retention period.	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
5.3.2	Statement – Education Act 1980 section 234 and any amendments	Yes	Education Act 1996, SEND Act 2001 section 1	Date of birth of the pupil + 25 years	Secure disposal – unless subject to a legal hold	School
5.3.3	Advice and information provided to parents regarding educational needs	Ye	As above – section 2	As above	As above	School
5.3.4	Accessibility strategy	Yes	As above – section 14	As above	As above	School

6 Curriculum Management

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
6.1	Statistics and Management Information					
6.1.1	Curriculum return	No		Current year + 3 years	Secure disposal	School
6.1.2	Examination results (school copy)	Yes		Current year + 6 years	Secure disposal	School
6.1.3	Published admission number (PAN) reports	Yes		Current year + 6 years	Secure disposal	School
6.1.4	Value added and contextual data	Yes		Current year + 6 years	Secure disposal	School
6.1.5	Self-evaluation forms	Yes		Current year + 6 years	Secure disposal	School
6.2	Implementation of Curriculum					
6.2.1	Schemes of work	No		Current year + 1 year	Review annually or secure disposal	School
6.2.2	Timetable	No		As above	As above	School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
6.2.3	Class record books, mark books, homework set records	No		Current year + 1 year	Review annually or secure disposal	School
6.2.4	Pupils' work	No		Return to pupil, where possible at the end of academic year. If not current year + 1 year	Secure disposal	School

7 Extra-curricular Activities

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
7.1	Educational visits outside the classroom					
7.1.1	Approval records for educational visit outside the classroom – Primary schools	No	Outdoor Educational Advisers' Panel National Guidance website http://oeapng.info sections 3 and 4	Date of visit + 14 years	Secure disposal	School
7.1.2	Approval records for educational visit outside the classroom – Secondary	No	As above	Date of visit + 10 years	Secure disposal	School
7.1.3	Parental consent forms where there has been no major incident	Yes		Conclusion of the trip Although forms could be retained for date of birth + 25 years, the requirement of being needed is low and capacity to retain every consent form issued by the school for this period of time may be unachievable.		School

Record Retention Schedule

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
7.1.4	Parental permission slips for school trips – where a major incident has occurred	Yes	Limitation Act 1980 section 2	Date of birth of pupil involved in incident + 25 years. Slips retained to show rules have been followed.	Secure disposal	School
7.1.5	Records relating to residential trips	Yes		Date of birth of youngest pupil involved + 25 years	Secure disposal	School

8 Central government and local authority

	Description of file or record	Data Protection issues	Statutory provision	Retention Period (operational)	Action needed at the end of record life	Actioned by Trust or School
8.1	Local authority					
8.1.1	Secondary transfer sheet (primary)	Yes		Current year + 2 years	Secure disposal	School
8.1.2	Attendance returns (where applicable)	Yes		Current year + 1 year	Secure disposal	School
8.1.3	School census return (where applicable)	No		Current year + 5 years	Secure disposal	School
8.2	Central government					
8.2.1	OFSTED reports and papers	No		Life of report then review	Secure disposal	School
8.2.2	Returns made to central government	No		Current year + 6 years	Secure disposal	School
8.2.3	Circulars and other information from central government	No		Operational use	Secure disposal	School