



**White Woods**  
Primary Academy Trust

# Records Management Policy and Retention Schedules

Reviewed by: DPO	Date: October 2020
Reviewed by: Trust Board	Date: 26/03/2021
Approved by: Trust Board	Date: 26/03/2021
Next review Due:	Date: October 2021

# 1. Records Management Policy

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## 1. Introduction

This policy recognises that an effective records management programme is key to facilitating the Trust's compliance with the legal and regulatory obligations as defined in the Trust's Information Policy. This policy should be read in conjunction with the Trust's Information Governance Policy.

Records management is recognised by the Trust as a core corporate function that supports the effective management of the Trust. A records management programme ensures that authoritative evidence of the Trust's work is created, captured, managed and made accessible within the scope of the Trust's Information Governance Policy Framework. This allows for improved accountability, transparency, continuity, decision-making, and better compliance with relevant legislation and regulations, as well as protection of the rights and interests of the Trust.

<sup>1</sup>

## 2. Scope

A record is defined as 'information created, received and maintained as evidence and as an asset in pursuit of legal obligations or in the transaction of business'.<sup>2</sup>

This policy applies to all records created, received or maintained by staff of the Trust in the course of carrying out its work, whether they are held electronically or in hard-copy. Records are retained as evidence for a set period determined by legal, regulatory and functional requirements.

A small proportion of records may be selected for permanent preservation and transferred to an archives service once they are no longer needed by a school for current business or legal purposes. This will be done in liaison with the County Archives Service.

## 3. Responsibilities

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

The SIRO will act as the accountable person and a champion for records management. They will oversee records management policy and strategy and ensure that the necessary resources

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<sup>1</sup> This policy has been formulated with reference to guidance and standards including the Lord Chancellor's Code of Practice on the management of records issued under section 46 of the Freedom of Information Act 2000; the International Standard ISO 15489-1: 2016 for Information and documentation – Records management; The National Archives Implementation Guide 3: Records Management Policy, 2010; The National Archives Model Action Plan for Schools, 2004; and the IRMS Information Management Toolkit for Schools version 5 – 01 February 2016.

<sup>2</sup> ISO 15489-1:2016

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are made available and remedial action is taken when problems arise. They will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. They will also monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately, and will support appropriate allocation of resources towards the school's records management programme, and will promote records management training for all staff.

The person with operational responsibility for the school's records management programme is the school administrator. They will ensure that the programme is developed, manage its implementation and overall functioning, including the production of any school specific procedures and guidance, work with the Trust to determine vital records and develop and implement disposal policies and schedules, as well as facilitating programme reviews and improvements.

All staff (including temporary staff) must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the Trust's records management guidelines.

## 4. Relationship with existing policies

This policy has been drawn up within the context of the Trust's Information Governance Policy Framework. In particular it flows from the Trust's Information Policy and helps to facilitate compliance with the requirements of the General Data Protection Regulation, Environmental Information Regulations 2004 (EIR) and Freedom of Information Act 2000 (FOIA), associated guidance and Codes of Practice issued under the legislation.

The Trust has adopted the retention schedule developed by the Information and Records Management Society (IRMS) to support its management and storage of information.

## 2.Retention Schedule

1. Trustees / School Governors					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
1.1	Register of Members, Membership Certificates	No	Companies Act 2006	Permanent	SECURE DISPOSAL
1.2	Register of Trustees, Declaration of willingness and eligibility to act as a Director	No	Companies Act 2006	Permanent	SECURE DISPOSAL
1.3	Minutes (Members, Trustees, Governors)	There may be data protection issues if the meeting is dealing with confidential issues relating to staff	Companies Act 2006	Permanent	If the school is unable to store these then the archives service should be used.
	a) Trust/School set (signed)				
	b) Inspection Copies	No		Date of Meeting + 3 years	SECURE DISPOSAL
1.4	Agendas (Members, Trustees, Governors)	There may be data protection issues if the meeting is dealing with confidential issues relating to staff	Companies Act 2006	Date of Meeting + 10 Years (One master copy retained with signed minutes)	SECURE DISPOSAL
1.5	Reports (Members, Trustees, Governors)	There may be data	Companies Act 2006	Reports should be kept for a minimum of 10 years. However, if the	SECURE DISPOSAL

## 2.Retention Schedule

1. Trustees / School Governors					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
		protection issues if the report deals with confidential issues relating to staff		minutes refer directly to individual reports then the reports should be kept permanently	
1.6	Meeting papers relating to the annual parents' meeting held under section 33 of the Education Act 2002	No	Education Act 2002, Section 33	Date of report + 6 years	SECURE DISPOSAL
1.7	Instruments of Government including the Memorandum and Articles of Association	No		Permanent	Retain whilst school open
1.8	Trust and Endowments	No		Permanent	Retain whilst operationally required
1.9	Action plans created and administered by the Trust Board and/or School Governance Committee	No		Expiry of Plan + 3 years	SECURE DISPOSAL
1.10	Policy documents created and administered by the Trust Board and/or School Governance Committee	No		Expiry of Policy+ 3 years	SECURE DISPOSAL
1.11	Records relating to complaints dealt with by the Trust Board or School Governance Committee	Yes		Date of resolution of complaint + 6 years. After six years review for further retention in the case of contentious disputes.	SECURE DISPOSAL
1.13	Signed Business interest forms	No	Companies Act 2006	Permanent	SECURE DISPOSAL
1.14	Signed Gifts and Hospitality forms	No	Companies Act 2006	Permanent	SECURE DISPOSAL
1.15	EFA Approvals	No	Funding Agreement	Permanent	SECURE DISPOSAL

2. CEO, Executive Headteacher, Head of School, Senior Leadership Teams					
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## 2.Retention Schedule

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
2.1	Log books of activity in the school maintained by the Head Teacher	There may be data protection issues if the log book refers to individual pupils or members of staff		Date of last entry in the book + a minimum of 6 years then review	These could be of permanent historical value and should be offered to the County Archives Service if appropriate
2.2	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	There may be data protection issues if the minutes refers to individual pupils or members of staff		Date of the meeting + 3 years then review	SECURE DISPOSAL
2.3	Reports created by the Head Teacher or the Management Team	There may be data protection issues if the report refers to individual pupils or members of staff		Date of the report + a minimum of 3 years then review	SECURE DISPOSAL
2.4	Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the records refer to individual pupils or members of staff		Current academic year + 6 years then review	SECURE DISPOSAL
2.5	Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the records refer to individual pupils or members of staff		Date of correspondence + 3 years then review	SECURE DISPOSAL
2.6	Professional Development Plans	Yes		Life of the plan + 6 years	SECURE DISPOSAL
2.7	School Development Plans	No		Life of the plan + 3 years	SECURE DISPOSAL

3. Property and Insurance					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
3.1	Title Deeds	No		Permanent	

## 2.Retention Schedule

3. Property and Insurance					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
3.2	Plans	No		Permanent	
3.3	Planning Permission	No		Permanent	
3.4	Maintenance and Contractors	No		Current year + 6 years	SECURE DISPOSAL
3.5	Lease Register and Leases	No		Expiry of lease + 6 years	SECURE DISPOSAL
3.6	Lettings Diary and Receipts	Yes		Current year + 3 years	SECURE DISPOSAL
3.7	Burglary, theft, vandalism report forms	Yes		Current year + 6 years	SECURE DISPOSAL
3.9	Employers Liability insurance certificate	No		Closure of the school + 40 years	SECURE DISPOSAL
3.10	Claims made against insurance policies – damage to property	Yes		Case concluded + 3 years	SECURE DISPOSAL
3.11	Claims made against insurance policies – personal injury	Yes		Case concluded + 6 years	SECURE DISPOSAL
3.12	Inventories of equipment and furniture	No		Current year + 6 years	SECURE DISPOSAL
3.13	Visitors Book and signing in sheets	Yes		Current Year + 6 Years then review	SECURE DISPOSAL

4. Finance					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
4.1	Annual Report and Financial Statements	No		Current Year + 6 years	STANDARD DSIPOSAL
4.2	Loans and Grants	No		Date of last payment on loan + 12 years then review	SECURE DISPOSAL
4.3	Contract				

## 2.Retention Schedule

4. Finance					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
	a) Under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
	b) Under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL
	c) Monitoring records	No		Current year + 2 years	SECURE DISPOSAL
	d) Register	No		Include all current plus those completed within last 6 years	SECURE DISPOSAL
4.4	Orders & Requisitions	No		Current year + 6 years	SECURE DISPOSAL
4.5	Copy remittances	No		Current year + 6 years	SECURE DISPOSAL
4.6	Receipt Books	No		Current year + 6 years	SECURE DISPOSAL
4.7	Budget Reports, Budget monitoring	Possible		Life of the Budget + 3 years	SECURE DISPOSAL
4.8	Invoices	No		Current year + 6 years	SECURE DISPOSAL
4.9	Delivery / Goods Received Notes	No		Current year + 6 years	SECURE DISPOSAL
4.10	Debtor records	No		Current year + 6 years	SECURE DISPOSAL
4.11	Cheque books	No		Current year + 6 years	SECURE DISPOSAL
4.12	Paying in books	No		Current year + 6 years	SECURE DISPOSAL
4.13	Petty Cash Books	No		Current year + 6 years	SECURE DISPOSAL
4.14	Signed Bank Reconciliations	No		Current year + 6 years	SECURE DISPOSAL
4.15	Bank Statements	No		Current year + 6 years	SECURE DISPOSAL
4.16	Grant Claims	No		Current year + 6 years	SECURE DISPOSAL
4.17	Consultants – Diary of visits, reports generated	No		Current year + 6 years	SECURE DISPOSAL



## 2.Retention Schedule

4. Finance					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
4.18	Donations Register	No		Current year + 6 years	SECURE DISPOSAL
4.19	Free School Meal Registers	No		Current year + 6 year	SECURE DISPOSAL
4.20	School Meal Registers + Summarues	No		Current year + 6 year	SECURE DISPOSAL

5. Recruitment					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
5.1	All records leading up to the appointment of a new headteacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
5.2	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
5.3	All records leading up to the appointment of a new member of staff – successful candidate	Yes		6 years from the end of employment	SECURE DISPOSAL
5.4	Pre-employment vetting information – DBS Checks	No	DBS Update Service Employer Guide June 2014: Keeping children safe in education. July 2015 (Statutory Guidance from Dept. of Education) Sections 73, 74	The Trust/schools do not have to keep copies of DBS certificates. If the Trust/school do so the copy must NOT be retained for more than 6 months	SECURE DISPOSAL
5.5	Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	Yes		Where possible these should be checked and a note kept of what was seen and what has been checked. If it is felt	SECURE DISPOSAL

## 2.Retention Schedule

5. Recruitment					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
				necessary to keep copy documentation then this should be placed on the member of staff's personal file	
5.6	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom <sup>4</sup>	Yes	An employer's guide to right to work checks [Home Office May 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 – Staff NOT working with children	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years	SECURE DISPOSAL
	Staff Personal File – Staff working with children	Yes		Termination of employment + 25 years	SECURE DISPOSAL
5.8	Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
5.9	Annual appraisal/ assessment records	Yes		Current year + 5 years	SECURE DISPOSAL
6. Personnel Records					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
6.1	Timesheets, sick pay	Yes		Current Year + 6 years	SECURE DISPOSAL
6.2	Staff personal files	Yes	Limitation Act 1980 (Section 2)	Termination + 6 years	SECURE DISPOSAL
6.3	Interview notes and recruitment records	Yes		Date of interview + 6 months	SECURE DISPOSAL

## 2.Retention Schedule

5. Recruitment					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
6.4	Pre-employment vetting information (including CRB/DBS checks)	No	CRB / DBS guidelines	Date of check + 6 months	SECURE DISPOSAL
6.5	Disciplinary proceedings	Yes	Warnings will not be referred to outside the parameters of	Where the warning relates to child protection issues contact LADO for further advice. Otherwise termination + 6 years.	SECURE DISPOSAL
6.6	Records relating to accident / injury at work	Yes		Date of incident + 12 years. In the case of serious incident 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	Pay Slips	Yes		Last date of employment + 85 years	SECURE DISPOSAL
6.9	Maternity / Paternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567)	Current year + 3 years	SECURE DISPOSAL
6.10	Records held under retirement benefits schemes (information powers) regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL
6.11	Proofs of identify collected as part of the process of checking "portable" enhanced CRB/DBS disclosure	Yes		Note retained of what has been seen and checked no retention of proofs required.	SECURE DISPOSAL

7. Health & Safety					
	Basic File Description	Data Protection 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

## 2.Retention Schedule

7. Health & Safety					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
7.2	Accident Reporting Adults Children	Yes Yes	Social Security (Claims & Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	Date of incident +7years DOB of child + 25 years	SECURE DISPOSAL
7.3	Record of Medicinal Product Administered on the premises, including the date and circumstances of its administration, by whom it was administered, including medicinal products which the child is permitted to administer alone, together with a record of parents consent.	Yes		DOB of child + 25 years	SECURE DISPOSAL
7.4	Medical Records as specified by the Control of Substances Hazardous to Health which also includes health surveillance (eg hearing tests, vibration white finger)			Current Year + 40 years (where appropriate an additional retention period may be allocated)	SECURE DISPOSAL
7.4	Incident Reports	Yes		Current year + 20 years	SECURE DISPOSAL
7.5	Policy Statements	No		Date of expiry + 1 year	SECURE DISPOSAL
7.6	Risk Assessments	Yes		Current Year + 3 years	SECURE DISPOSAL
7.7	Process of monitoring areas where employees and persons are likely to have become in contact with asbestos (including asbestos plans)	No	Control of Asbestos at Work Regulations	Last Action + 40 years	SECURE DISPOSAL
7.8	Process of monitoring areas where employees and persons are likely to have become in contact with radiation	No	Ionising Radiations Regulations 1999	Last Action + 50 Years (or until the person reaches 75 years of age)	SECURE DISPOSAL
7.9	Fire precautions log books (including evacuation logs)	No		Current Year + 6 years	SECURE DISPOSAL
7.10	Emergency Lighting testing and log books	No		Current Year + 6 years	SECURE DISPOSAL
7.11	Gas Safety Certificates	No		Current Year + 6 years	SECURE DISPOSAL

## 2.Retention Schedule

7. Health & Safety					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
7.12	Fixed Electrical Testing	No		Current Year + 6 years	SECURE DISPOSAL
7.13	Portable Appliance Testing	No		Current Year + 6 years	SECURE DISPOSAL
7.14	Legionella Testing and Log books	No		Current Year + 6 years	SECURE DISPOSAL

8. Pupil's/Student's Educational Record					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
8.1	Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005	Yes	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437		
8.2	Primary	Yes		Retain whilst the child remains at the primary school	The file should follow the pupil when he/she leaves the primary school. This will include: <ul style="list-style-type: none"> <li>• to another primary school</li> <li>• to a secondary school</li> <li>• to a pupil referral unit</li> </ul> If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period. If the pupil transfers to an independent school, transfers to home

## 2.Retention Schedule

8. Pupil's/Student's Educational Record					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
					schooling or leaves the country the file should be returned to the Local Authority to be retained for the statutory retention period. Primary Schools do not ordinarily have sufficient storage space to store records for pupils who have not 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
8.3	Secondary	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	SECURE DISPOSAL
8.4	Examination Results – Pupil Copies	Yes			
8.4.1	Public			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board.
8.4.2	Internal			This information should be added to the pupil file	

## 9. Child Protection Files

## 2.Retention Schedule

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
9.1	Child Protection Information held on pupil Files	Yes	“Keeping children safe in education Statutory guidance for schools and colleges March 2015”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	DOB + 25 Years * <i>It is recommended that all records relating to child abuse are retained until the National Child Abuse Inquiry is completed. This section will then be reviewed again to take into account any recommendations the Inquiry might make concerning record retention</i>	SECURE DISPOSAL
9.2	Child protection information held in separate files	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	DOB of the child + 25 years then review This retention period is on the understanding that the principal copy of this information will be found on the Local Authority records	SECURE DISPOSAL

10.	Attendance				
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
10.1	Attendance Registers	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made.	SECURE DISPOSAL
10.2	Correspondence relating to authorised absence	Yes	Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

## 2.Retention Schedule

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11. Special Educational Needs					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
11.1	<p>Special Educational Needs files, reviews and Individual Education Plans</p> <p>Please note: This section only applies to secondary schools. These records should move with the pupil when they leave the Primary school and move to the Secondary school.</p>	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	<p>REVIEW</p> <p>NOTE: This retention period is the minimum retention period that any pupil file should be kept. An SEN file may be kept for a longer period of time for defence 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>
11.2	Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
11.3	Advice and information provided to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
11.4	Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold



## 2.Retention Schedule

12. Curriculum					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
12.1	Curriculum returns	No		Current Year + 3 Year	SECURE DISPOSAL
12.2	Examination Results (Schools Copy)	Yes		Current Year + 6 Year	SECURE DISPOSAL
12.2.1	SATS records –	Yes			SECURE DISPOSAL
12.2.2	Results			The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all the whole year SATs results. These could be kept for current year + 6 years to allow suitable comparison	SECURE DISPOSAL
12.2.3	Examination Papers			The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
12.3	Published Admission Number (PAN) Reports	Yes		Current year + 6 years	SECURE DISPOSAL
12.4	Value Added and Contextual Data	Yes		Current year + 6 years	SECURE DISPOSAL
12.5	Self Evaluation Forms	Yes		Current year + 6 years	SECURE DISPOSAL

## 2.Retention Schedule

13. Implementation of Curriculum					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
13.1	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 further retention period or SECURE DISPOSAL
13.2	Timetable	No		Current year + 1 year	
13.3	Class Record Books	No		Current year + 1 year	
13.4	Mark Books	No		Current year + 1 year	
13.5	Record of homework set	No		Current year + 1 year	
13.6	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

14. Educational Visits Outside the Classroom					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
14.1	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 <a href="http://oeapng.info">http://oeapng.info</a> specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice"	Date of visit + 14 years	SECURE DISPOSAL
14.2	Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools	No	Outdoor Education Advisers' Panel National Guidance website <a href="http://oeapng.info">http://oeapng.info</a> specifically	Date of visit + 10 years	SECURE DISPOSAL

## 2.Retention Schedule

14. Educational Visits Outside the Classroom					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
			Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice"		
14.3	Parental consent forms for school trips where there has been no major incident	Yes		Conclusion of the trip	Although the consent forms could be retained for DOB + 22 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time.
14.4	Parental permission slips for school trips – where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	DOB of the pupil 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	SECURE DISPOSAL

15. Walking Bus					
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## 2.Retention Schedule

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
15.1	Walking Bus Registers	Yes		Date of register + 3 years This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report and kept for the period of time required for accident reporting	SECURE DISPOSAL [If these records are retained electronically any back up copies should be destroyed at the same time]

16.	Family Liaison Officers and Home School Liaison Assistants				
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
16.1	Day Books	Yes		Current year + 2 years then review	SECURE DISPOSAL
16.2	Reports for outside agencies - where the report has been included on the case file created by the outside agency	Yes		Whilst child is attending school and then destroy	SECURE DISPOSAL
16.3	Referral forms	Yes		While the referral is current	SECURE DISPOSAL
16.4	Contact data sheets	Yes		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL
16.5	Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL
16.6	Group Registers	Yes		Current year + 2 years	SECURE DISPOSAL

## 2.Retention Schedule

17. Local Authority and Central Government Liason					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
17.1	Secondary Transfer Sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
17.2	Attendance Returns	Yes		Current year + 1 year	SECURE DISPOSAL
17.3	School Census Returns	No		Current year + 5 years	SECURE DISPOSAL
17.4	OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
17.5	Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL