SILS Schools Management of Records Policy

2025 – 2026

SOUTHWARK INCLUSIVE LEARNING SERVICE (SILS)

Headteacher	Signature:
Management Committee	Signature:
Last Review Date	September 2026
Next Review Date	September 2027

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School Records Management Policy

Introduction

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

- Scope
- Responsibilities
- Relationships with existing policies

1. Scope of the policy

1.1 This policy applies to all records created, received or maintained by staff of the school in the course of carrying out its functions.
1.2 Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.
1.3 A small percentage of the school's records will be selected for permanent preservation as part of the institution's archives and for historical research.
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2. Responsibilities

2.1 The school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Head of the School.
2.2 The person responsible for records management in the school 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.
2.3 Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines.

3. Relationship with existing policies

This policy has been drawn up within the context of:
• Freedom of Information policy
• Data Protection policy

• and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

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Management of the School

This section contains retention periods connected to the general management of the school. This covers the work of the Governing Body,the Head of School and the senior management team, the admissions process and operational administration.

1.1 Governing Body				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.1.1 Agendas for Governing Body meetings	**There may be data protection issues if the meeting is dealing with confidential issues relating to staff**		One copy should be retained with the master set of minutes. All other copies can be disposed of	SECURE DISPOSAL
1.1.2 Minutes of Governing Body Meetings	**There may be data protection issues if the meeting is dealing with confidential issues relating to staff**		One copy should be retained with the master set of minutes. All other copies can be disposed of	SECURE DISPOSAL
Principal Set (signed)			PERMANENT	If the school is unable to store these then they should be offered to the County Archives Service
Inspection Copies2			Date of meeting + 3 years	If these minutes contain any sensitive, personal information they must be shredded.
1.1.3 Reports presented to the Governing Body	**There may be data protection issues if the report deals with confidential issues relating to staff**		Reports should be kept for a **minimum of 6 years.** However, if the minutes refer directly to individual reports then the reports should be kept permanently	SECURE DISPOSAL or retain with the signed set of the minutes
1.1.4 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 the meeting + a minimum of 6 years	SECURE DISPOSAL
1.1 Governing Body				

Basic file description	Data Protection Issues (GDPR from May 2018)	Statutory Provisions	Retention Period [Operational]	Action at the end of the administrative life of the record
1.1.5 Instruments of Government including Articles of Association	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.
1.1.6 Trusts and Endowments managed by the Governing Body	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.
1.1.7 Action plans created and administered by the Governing Body	No		Life of the action plan + 3 years	SECURE DISPOSAL
1.1.8 Policy documents created and administered by the Governing Body	No		Life of the policy + 3 years	SECURE DISPOSAL
1.1.9 Records relating to complaints dealt with by the Governing Body	**Yes**		Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	SECURE DISPOSAL
1.1.10 Annual Reports created under the requirements of the Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002	No	Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171	Date of report + 10 years	SECURE DISPOSAL
1.1.11 Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies	No		Date proposal accepted or declined + 3 years	SECURE DISPOSAL
1.2 Head Teacher and Senior Management Team				

Basic file description	Data Protection Issues (GDPR from May 2018)	Statutory Provisions	Retention Period [Operational]	Action at the end of the administrative life of the record
1.2.1 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
1.2.2 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
1.2.3 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
1.2.4 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
1.2.5 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 correspondence refers to individual pupils or members of staff**		Date of correspondence + 3 years then review	SECURE DISPOSAL
1.2.6 Professional Development Plans	**Yes**		Life of the plan + 6 years	SECURE DISPOSAL
1.2.7 School Development Plans	No		Life of the plan + 3 years	SECURE DISPOSAL

1.3 Admissions Process				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.3.1 All records relating to the creation and implementation of the School Admissions' Policy	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Life of the policy + 3 years then review	SECURE DISPOSAL
1.3.2 Admissions – if the admission is successful	**Yes**	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Date of admission + 1 year	SECURE DISPOSAL
1.3.3 Admissions – if the appeal is unsuccessful	**Yes**	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Resolution of case + 1 year	SECURE DISPOSAL

1.3 Admissions Process contd.				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.3.4 Register of Admissions	**Yes**	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made.	**REVIEW** **Schools may wish to consider keeping the admission register permanently** as often schools receive enquiries from past pupils to confirm the dates they attended the school.
1.3.5 Admissions – Secondary Schools – Casual	**Yes**		Current year + 1 year	SECURE DISPOSAL
1.3.6 Proofs of address supplied by parents as part of the admissions process	**Yes**	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels December 2014	Current year + 1 year	SECURE DISPOSAL
1.3.7 Supplementary Information forms including additional information such as religion, medical conditions etc.	**Yes**			
*For **successful** admissions*			For successful admissions This information should be added to the pupil file	SECURE DISPOSAL
*For **unsuccessful** admissions*			For unsuccessful admissions Until appeals process completed	SECURE DISPOSAL

1.4 Operational Administration				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
1.4.1 General file series	No		Current year + 5 years then REVIEW	SECURE DISPOSAL
1.4.2 Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	STANDARD DISPOSAL
1.4.3 Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	STANDARD DISPOSAL
1.4.4 Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
1.4.5 Visitors' Books and Signing in Sheets	**Yes**		Current year + 6 years then REVIEW	SECURE DISPOSAL
1.4.6 Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 years then REVIEW	SECURE DISPOSAL

2. Human Resources

This section deals with all matters of Human Resources management within the school.

2.1 Recruitment				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.1.1 All records leading up to the appointment of a new Headteacher	**Yes**		Date of appointment + 6 years	SECURE DISPOSAL
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
2.13 All records leading up to the appointment of a new member of staff – ***successful*** candidate	**Yes**		All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	SECURE DISPOSAL
2.1.4 Pre-employment vetting information – DBS Checks	No	**DBS Update Service Employer Guide June 2014: Keeping children safe in education. September 2016 (Statutory Guidance from Dept. of Education) Sections 73, 74**	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months	
2.1 Recruitment contd.				

Basic file description	Data Protection Issues (GDPR from May 2018)	Statutory Provisions	Retention Period [Operational]	Action at the end of the administrative life of the record
2.1.5 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 necessary to keep copy documentation, then this should be placed on the member of staff's personal file	
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]**	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**	
2.2 Operational Staff Management				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.2.1 Staff Personal File	**Yes**	**Limitation Act 1980 (Section 2)**	Termination of Employment + 6 years	SECURE DISPOSAL
2.2.2 Timesheets	**Yes**		Current year + 6 years	SECURE DISPOSAL
2.2.3 Annual appraisal/ assessment records			Current year + 5 years	SECURE DISPOSAL

2.3 Management of Disciplinary and Grievance Processes				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.3.1 Allegation of a child protection nature against a member of staff including ***where the allegation is unfounded***	**Yes**	**Yes "Keeping children safe in education Statutory guidance for schools and colleges September 2016"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015"**	Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. ***Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned***.	SECURE DISPOSAL **These records must be shredded**
2.3.2 Disciplinary Proceedings	**Yes**			
oral warning			Date of warning + 6 months	
written warning – level 1			Date of warning + 6 months	SECURE DISPOSAL (If warnings are placed on personnel files then they must be weeded from the file)
written warning – level 2			Date of warning + 12 months	
final warning			Date of warning + 18 months	
case not found			If the incident is child protection related then see above otherwise dispose of at the conclusion of the case	SECURE DISPOSAL

2.4 Health and Safety				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.4.1 Health and Safety Policy Statements	No		Life of policy + 3 years	SECURE DISPOSAL
2.4.2 Health and Safety Risk Assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL
2.4.3 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
2.4.4 Accident Reporting	**Yes**	**Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980**		
Adults			**Date of the incident + 6 years**	SECURE DISPOSAL
Children			**DOB of the child + 25 years**	SECURE DISPOSAL

2.4 Health and Safety contd.				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.4.5 Control of Substances Hazardous to Health (COSHH)	No	**Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)**	**Current year + 40 years**	SECURE DISPOSAL
2.4.6 Process of monitoring of areas where employees and persons are likely to have become in contact with **asbestos**	No	**Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19**	**Last action + 40 years**	SECURE DISPOSAL
2.4.7 Process of monitoring of areas where employees and persons are likely to have become in contact with **radiation**	No		**Last action + 50 years**	SECURE DISPOSAL
2.4.8 Fire Precautions log books	No		**Current year + 6 years**	SECURE DISPOSAL

2.5 Payroll and Pensions				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
2.5.1 Maternity pay records	**Yes**	**Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)**	Current year + 3 years	SECURE DISPOSAL
2.5.2 Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	**Yes**		Current year + 6 years	SECURE DISPOSAL

3. Financial Management of the School

This section deals with all aspects of the financial management of the school including the administration of school meals.

3.1 Risk Management and Insurance				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.1.1 Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL
3.2 Asset Management				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.2.1 Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
3.2.2 Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL
3.3 Accounts and Statements including Budget Management				
Basic file description	**Data Protection Issues (GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.3.1 Annual Accounts	No		Current year + 6 years	STANDARD DISPOSAL
3.3.2 Loans and grants managed by the school	No		Date of last payment on the loan + 12 years then REVIEW	SECURE DISPOSAL
3.3.3 Student Grant applications	**Yes**		Current year + 3 years	SECURE DISPOSAL
3.3.4 All records relating to the creation and management of budgets including the Annual Budget statement and background papers	No		Life of the budget + 3 years	SECURE DISPOSAL

3.3 Accounts and Statements including Budget Management contd.				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.3.5 Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL
3.3.6 Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
3.3.7 Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL
3.4 Contract Management				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.4.1 All records relating to the management of contracts under seal	No	**Limitation Act 1980**	Last payment on the contract + 12 years	SECURE DISPOSAL
3.4.2 All records relating to the management of contracts under signature	No	**Limitation Act 1980**	Last payment on the contract + 6 years	SECURE DISPOSAL
3.4.3 Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL

3.5 School Fund				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.5.1 School Fund - Cheque books	No		Current year + 6 years	SECURE DISPOSAL
3.5.2 School Fund - Paying in books	No		Current year + 6 years	SECURE DISPOSAL
3.5.3 School Fund – Ledger	No		Current year + 6 years	SECURE DISPOSAL
3.5.4 School Fund – Invoices	No		Current year + 6 years	SECURE DISPOSAL
3.5.5 School Fund – Receipts	No		Current year + 6 years	SECURE DISPOSAL
3.5.6 School Fund - Bank statements	No		Current year + 6 years	SECURE DISPOSAL
3.5.7 School Fund – Journey Books	No		Current year + 6 years	SECURE DISPOSAL
3.6 School Meals Management				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
3.6.1 Free School Meals Registers	**Yes**		Current year + 6 years	SECURE DISPOSAL
3.6.2 School Meals Registers	**Yes**		Current year + 3 years	SECURE DISPOSAL
3.6.3 School Meals Summary Sheets	No		Current year + 3 years	SECURE DISPOSAL

4. Property Management

This section covers the management of buildings and property.

4.1 Property Management				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
4.1.1 Title deeds of properties belonging to the school	No		**PERMANENT** These should follow the property unless the property has been registered with the Land Registry	
4.1.2 Plans of property belong 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.	
4.1.3 Leases of property leased by or to the school	No		Expiry of lease + 6 years	SECURE DISPOSAL
4.1.4 Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL

4.2 Maintenance				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
4.2.1 All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
4.2.2 All records relating to the maintenance of the school carried out by school employees including maintenance log books	No		Current year + 6 years	SECURE DISPOSAL

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.

5.1 Pupil's Educational Record				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.1.1 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**		
Secondary			**Date of birth + 25 years**	**SECURE DISPOSAL** Items which should be included on the pupil record If the pupil has attended an early years setting, then the record of transfer should be included on the pupil file Admission form (application form) Privacy Notice [if these are issued annually only the most recent need be on the file] Photography Consents Years Record Annual Report to Parents National Curriculum and Religious Education Locally Agreed Syllabus Record Sheets Any information relating to a major incident involving the child (either an accident or other incident) Any reports written about the child Any information about a statement and support offered in relation to the statement Any relevant medical information (should be stored in the

				file in a sealed envelope clearly marked as such) Child protection reports/disclosures (should be stored in the file in a sealed envelope clearly marked as such) Any information relating to exclusions (fixed or permanent) Any correspondence with parents or outside agencies relating to major issues Details of any complaints made by the parents or the pupil
5.1 Pupil's Educational Record ***This review took place as the Independent Inquiry on Child Sexual Abuse was beginning. In light of this, it is recommended that all records relating to child abuse are retained until the Inquiry is completed. This section will then be reviewed again to take into account any recommendations the Inquiry might make concerning record retention***				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.1.2 Examination Results – Pupil Copies	**Yes**			
Public			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board.
Secondary			This information should be added to the pupil file	
5.1.3 Child Protection information held on pupil file	**Yes**	**"Keeping children safe in education Statutory guidance for schools and colleges Sept 2016"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children**	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file. **Date of birth + 25 years**	**SECURE DISPOSAL– these records MUST be shredded**

		March 2015"		
5.1 Pupil's Educational Record contd.				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.1.4 Child Protection information held in separate files	**Yes**	**"Keeping children safe in education Statutory guidance for schools and colleges September 2016"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015"**	**DOB of the child + 25 years then review** This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	SECURE DISPOSAL – **these records MUST be shredded**
Retention periods relating to allegations made against adults can be found in the Human Resources section of this retention schedule.				
5.2 Attendance				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.2.1 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
5.2.2 Correspondence relating to authorised absence		**Education Act 1996 Section 7**	Current academic year + 2 years	SECURE DISPOSAL

5.3 Special Educational Needs				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
5.3.1 Special Educational Needs files, reviews and Individual Education Plans	**Yes**	**Limitation Act 1980 (Section 2)**	Date of Birth of the pupil + 25 years	**REVIEW NOTE:** This retention period is the minimum retentio period that any pupil file should be kept. Some authorities choose to keep SEN files fo a longer period of time to defend themselves in a "failure to provide a sufficient education" case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented.
5.3.2 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 documen is subject to a legal hold**
5.3.3 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 documen is subject to a legal hold**
5.3.4 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 documen is subject to a legal hold**

6. Curriculum Management

6.1 Statistics and Management Information				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
6.1.1 Curriculum returns	No		Current year + 3 years	SECURE DISPOSAL
6.1.2 Examination Results (Schools Copy)	**Yes**		Current year + 6 years	SECURE DISPOSAL
SATS records -	**Yes**			
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
Examination Papers			The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
6.1.3 Published Admission Number (PAN) Reports	**Yes**		Current year + 6 years	SECURE DISPOSAL
6.1.4 Value Added and Contextual Data	**Yes**		Current year + 6 years	SECURE DISPOSAL
6.1.5 Self Evaluation Forms	**Yes**		Current year + 6 years	SECURE DISPOSAL

6.2 Implementation of Curriculum				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
6.2.1 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
6.2.2 Timetable			Current year + 1 year	
6.2.3 Class Record Books			Current year + 1 year	
6.2.4 Mark Books			Current year + 1 year	
6.2.5 Record of homework set			Current year + 1 year	
6.2.6 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

7. Extra-Curricular Activities

7.1 Educational Visits outside the Classroom				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
7.1.1 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 http://oeapng.info specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice".**	Date of visit + 10 years	SECURE DISPOSAL
7.1.2 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.

7.1 Educational Visits outside the Classroom contd.				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
7.1.3 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	
7.2 Family Liaison Officers and Home School Liaison Assistants				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
7.2.1 Day Books	**Yes**		Current year + 2 years then review	
7.2.2 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	
7.2.3 Referral forms	**Yes**		While the referral is current	
7.2.4 Contact data sheets	**Yes**		Current year then review, if contact is no longer active then destroy	
7.2.5 Contact database entries	**Yes**		Current year then review, if contact is no longer active then destroy	
7.2.6 Group Registers	**Yes**		Current year + 2 years	

8. Central Government and Local Authority

This section covers records created in the course of interaction between the school and the local authority.

8.1 Local Authority				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
8.1.1 Secondary Transfer Sheets (Primary)	**Yes**		Current year + 2 years	SECURE DISPOSAL
8.1.2 Attendance Returns	**Yes**		Current year + 1 year	SECURE DISPOSAL
8.1.3 School Census Returns	No		Current year + 5 years	SECURE DISPOSAL
8.1.4 Circulars and other information sent from the Local Authority	No		Operational use	SECURE DISPOSAL
8.2 Central Government				
Basic file description	**Data Protection Issues** **(GDPR from May 2018)**	**Statutory Provisions**	**Retention Period [Operational]**	**Action at the end of the administrative life of the record**
8.2.1 OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
8.2.2 Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL
8.2.3 Circulars and other information sent from central government	No		Operational use	SECURE DISPOSAL