



HOPE LEARNING COMMUNITY

Records Management and Retention policy and Procedure



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Records Management and Retention policy.

Approved by trustees: May 2023

Review: Every 2 years

Supplied as word document to:

- 1. Review and complete highlighted areas**
- 2. Convert to pdf**
- 3. Make available to all staff**
- 4. Publish on school website/link to trust website.**

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Data Records Management & Retention Policy

The trust 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 trust and provide evidence for demonstrating performance and accountability. This document provides the policy framework through which this effective management can be achieved and audited.

1: Scope of the Policy

This policy applies to all records created, received or maintained by staff of the Hope Learning Community and its schools and college in the course of carrying out its functions.

Records are defined as all those documents that facilitate the business carried out by the trust 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.

2: 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 this policy is the Director of Governance and Compliance.

The Head of each school/college is responsible for records management in the school/college and 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.

The Director of Governance and Compliance will monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately.

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 retention guidelines.

3: Information Security & Business Continuity

In order to protect the data and records the trust is responsible for, the following security measures will be implemented.

The Storage & Security of Digital Data

Back Up System: The trust's schools/college will undertake regular back-ups of all information held electronically to enable restoration of the data in the event of an environmental or data corruption incident.

The school tests that data can be restored from a back-up on a regular basis <replace 'regular basis' with how often school will test the restoration of data from a back-up>.

Controlling the Storage of Digital Data: Personal information is not to be stored on the hard drive of any laptop or PC unless the device is running encryption software.

The Trust's Bring Your Own Device policy outlines how data can be accessed and stored on personal devices.

Password Control: The trust will ensure that data is subject to a robust password protection regime and from June 2022, 2 factor authentication will also be needed to access password-controlled devices. Password sharing is not encouraged. Staff are required to lock their PCs when they are away from their desks to prevent unauthorised use.

Location of Server Equipment: The trust will ensure that the server environment is managed to prevent access by unauthorised people. <insert details of school specific storage arrangements>

The Storage & Security of Hard Copy Data

Storage of Physical Records: The trust recommends that all physical records are stored in filing cabinets, drawers or cupboards. Sensitive physical records should be kept in a lockable storage area. This is to prevent unauthorised access but also to protect against the risk of fire and flooding.

Unauthorised Access, Theft or Loss: Staff are encouraged not to take personal data on staff or students off the school /college premises unless there is no alternative. Records held within the school/college should be in lockable cabinets.

Clear Desk Policy: In order to avoid unauthorised access to physical records which contain sensitive or personal information and to protect physical records from fire and/or flood damage, the trust operates a clear desk policy. This involves the removal of physical records to a cupboard or drawer (lockable where appropriate). It does not mean that the desk has to be cleared of all contents.

4: Disclosure / Confidentiality

Staff are made aware of the importance of ensuring that personal information is only disclosed to people who are entitled to receive it and that consideration has been given to the UK General Data Protection Regulations (GDPR). This is outlined in the trust Staff Handbook.

If any member of staff receives a request for information from a third party, then the process outlined in the trust's Third Party Requests for Information Process should be followed.

5. Safe Disposal of Records

The UK General Data Protection Regulations give individuals the Right to Erasure which means that records should not be kept for any longer than is necessary in relation to the purpose for which it was originally collected/processed (see section 6 Retention Guidelines).

All records containing personal information or sensitive policy information should be made either unreadable or unreconstructable.

- Paper records should be shredded using a cross-cutting shredder
- CDs/DVDs/Floppy Discs should be cut into pieces
- Audio/Video Tapes and Fax Rolls should be dismantled and shredded
- Hard discs should be dismantled and sanded

Where an external provider is used, the disposal company should be confirmed as compliant with data protection legislation and must provide a Certificate of Destruction.

Where an external company is used to destroy hardware, the disposal company must provide a Certificate of Destruction.

6. Security Breach

In the event of an incident involving the loss of information or records held by Hope Learning Community and its schools/college, the trust's Data Breach Policy should be followed.

7: Retention Guidelines

This retention schedule contains recommended retention periods for the different records created and maintained by Hope Learning Community and its schools/college in the course of their business. The schedule refers to all information regardless of the media in which it is stored.

Some of the retention periods are governed by statute. Others are guidelines following best practice. Every effort has been made to ensure that these retention periods are compliant with the requirements of the Data Protection Act 2018 (DPA).

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

The schedule should be reviewed at least every two years.

Section 1: Management of the School

1.1 Governing Body					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
1.1.1	Agendas for Governing Body	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 (principal set – signed)	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		PERMANENT Although generally kept for life of organisation, Local Authority only required to make available for 10 years from date of meeting.	If the school is unable to store these then they should be offered to the County Archives Service.
1.1.3	Reports presented to the Governing Body	There may be data protection issues if the report is dealing with confidential issues relating to staff		Although generally kept for life of organisation, Local Authority only required to make available for 10 years from date of meeting.	SECURE DISPOSAL or retain with the signed set of minutes
1.1.4	Meeting papers relating to annual parents' meeting held under section 33 of the Education Act 2002	Yes	Education Act 2002, Section 33	Date of the meeting + a minimum of 6 years	SECURE DISPOSAL
1.1.5	Register of attendance at full governing board meetings	Yes		Date of the last meeting in the book + 6 years	SECURE DISPOSAL
1.1.6	Records relating to Governor monitoring visits	Yes		Date of the visit + 3 years	SECURE DISPOSAL
1.1.7	Annual reports required by the DfE	No		Date of report + 10 years	SECURE DISPOSAL

1.1.8	All records relating to the conversion of schools to Academy status	No		For the life of the academy	Consult local archives before disposal
1.1.9	Records relating to complaints made to and investigated by the governing body or head teacher	Yes		Major complaints: current year + 6 years. If negligence involved, then: current year + 15 years. If child protection or safeguarding issues are involved, then: current year + 40 years	SECURE DISPOSAL
1.1.10	Correspondence sent and received by the governing body or head teacher	Potential		General correspondence should be retained current + 3 years	SECURE DISPOSAL
1.1.11	Action plans created and administered by the governing body			Until superseded or whilst relevant	SECURE DISPOSAL
1.1.12	Policy documents created and administered by the governing body			Until superseded (the school should consider keeping all policies relating to safeguarding, child protection or other pupil related issues such as exclusion until the IICSA has issued its recommendations)	
1.1.13	Records relating to the appointment of a clerk to the governing body	Yes		Date on which clerk appointment ceases + 6 years	SECURE DISPOSAL
1.1.14	Records relating to the terms of office of serving governors, including evidence of appointment	Yes		Date appointment ceases + 6 years	

1.1.15	Records relating to governor declaration against disqualification criteria	Yes		Date appointment ceases + 6 years	SECURE DISPOSAL
1.1.16	Register of Business Interests	Yes		Date appointment ceases + 6 years	SECURE DISPOSAL
1.1.17	Governors Code of Conduct			This is expected to be a dynamic document; one copy of each version should be kept for the life of the organisation	
1.1.18	Records relating to the training required and received by Governors	Yes		Date Governor steps down + 6 years	SECURE DISPOSAL
1.1.19	Records relating to the induction programme for new governors	Yes		Date appointment ceases + 6 years	SECURE DISPOSAL
1.1.20	Records relating to DBS checks carried out on clerk and members of the governing body	Yes		Date of DBS check + 6 months	SECURE DISPOSAL
1.1.21	Governor personnel files	Yes		Date appointment ceases + 6 years	SECURE DISPOSAL

1.2 Senior Leadership Team

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
1.2.1	Logbooks of activity in the school maintained by the Head Teacher	There may be data protection issues if the logbook refers to individual 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 + 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 report refers 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 report 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

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
1.3.1	All records relating to the creation and implementation	No	School Admissions Code Statutory guidance for admission authorities,	Life of the policy + 3 years then review	SECURE DISPOSAL

	of the School Admissions Policy		governing bodies, local authorities, school adjudicators and admission appeals panels December 2014		
1.3.2	Admissions – if the admission is successful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, school 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, school adjudicators and admission appeals panels December 2014	Resolution of case + 1 year	SECURE DISPOSAL
1.3.4	Register of Admissions	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, school adjudicators and admission appeals panels December 2014	Every entry in the admission 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 admission register permanently as often schools receive enquiries from past pupils to confirm the dates they attended the school Or Transfer to the appropriate County Archives Service

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, school adjudicators and admission appeals panels December 2014	Current year + 1 year	SECURE DISPOSAL
1.3.7	Supplementary Information form including additional information such as religion, medical conditions etc.	Yes			
	For successful admissions			The information should be added to the pupil file	SECURE DISPOSAL
	For unsuccessful admissions			Until appeals process completed (GDPR)	SECURE DISPOSAL

1.4 Operational Administration

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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	SECURE DISPOSAL
1.4.3	Records relating to the creation and distribution of	No		Current year + 1 year	SECURE DISPOSAL

	circulars to staff, parents or pupils				
1.4.4	Newsletters and other items with a short operational use	No		Current year + 1 year	SECURE DISPOSAL
1.4.5	Visitors' Books and Signing in Sheets, electronic visitors' management systems.	Yes		Last entry + 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
1.4.7	School Privacy Notice which is sent to parents as of GDPR compliance			Until superseded + 6 years	
1.4.8	Consents relating to school activities as part of GDPR compliance (for example consent to be sent circulars or mailings)	Yes		Consent will last whilst the pupil attends the school it can therefore be destroyed when the pupil leaves	SECURE DISPOSAL

Section 2: HR Management of the School

2.1 Recruitment					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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
2.1.3	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	Yes	DBS Update Service Employer Guide June 2014: keeping children safe in education 2019 (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	
2.1.5	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 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 United Kingdom	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 the Home Office requires that the documents are kept for termination of Employment + 2 years	
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2.2 Operational Staff Management

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
2.2.1	Staff Personal File	Yes	Limitation Act 1980 (section 2)	Termination of Employment + 6 years Unless the member of staff is part of any case which falls under the terms of reference of IICSA. If this is the case, then the file will need to be retained until IICSA enquiries are complete.	SECURE DISPOSAL
2.2.2	Annual appraisal/assessment records	Yes		Current year + 6 years	SECURE DISPOSAL
2.2.3	Sickness Absence Monitoring	Yes		Keep Separate from accident records. Where sickness pay is not paid then current year + 3 is acceptable.	

				Where sickness pay is paid, becomes a financial record so current year + 6 applies.	
2.2.4	Staff Training – where training leads to continuing professional development	Yes		Length of time required by the professional body	SECURE DISPOSAL
2.2.5	Staff Training – except where dealing with children e.g. first aid or health and safety	Yes		Retained on the personnel file (Termination of employment + 6 years)	SECURE DISPOSAL
2.2.6	Staff Training - where the training relates to children e.g. safeguarding or other child related training.	Yes		Date of the training + 40years. The IICSA may wish to see training records as part of an investigation	SECURE DISPOSAL

2.3 Management of Disciplinary & Grievance Process

Note:

The ACAS code of practice on disciplinary and grievance procedures recommends that the employee should be told how long a disciplinary warning will remain current. However, this does not mean that the data itself should be destroyed at the end of the set period.

Any disciplinary proceedings data will be a record on an important event in the course of the employer’s relationship with the employee. Should the same employee be accused on similar misconduct five years down the line, and then defend him or herself by saying ‘I would never do something like that’, reference to the earlier proceedings may show that the comment should not be given credence. Alternatively, if the employee were to be dismissed for some later offence then claim at tribunal that he or she had ‘fifteen years of unblemished service’ the record of the disciplinary proceedings would be effective evidence to counter this claim.

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
2.3.1	Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Yes	“Keeping children safe in education Statutory guidance for schools and colleges September 2019”; “Working together to safeguard children.	Until the person’s normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note	SECURE DISPOSAL These records must be shredded

			A guide to inter-agency working to safeguard and promote the welfare of children 2018”	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 UNLESS the member of staff is part of any case which falls under the terms of reference of IICSA, then the files will need to be retained until IICSA enquiries are complete.	
2.3.2	Disciplinary Proceedings	Yes			
	Oral warning			Date of warning + 6 months	SECURE DISPOSAL [If warnings are placed on personal files then they must be weeded from the file]
	Written warning – level 1			Date of warning + 6 months	
	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 Payroll and Pensions					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
2.4.1	Absence record	Yes		Current year + 3 years	SECURE DISPOSAL
2.4.2	Batches	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.3	Bonus sheets	Yes		Current year + 3 years	SECURE DISPOSAL

2.4.4	Car allowance claims	Yes		Current year + 3 years	SECURE DISPOSAL
2.4.5	Car loans	Yes		Completion of loan + 6 years	SECURE DISPOSAL
2.4.6	Car mileage output	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.7	Elements	Yes		Current year + 2 years	SECURE DISPOSAL
2.4.8	Income tax form P60	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.9	Insurance	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.10	Maternity Payment	Yes		Current year + 3 years	SECURE DISPOSAL
2.4.11	Members allowance register	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.12	National Insurance schedule of payments	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.13	Overtime	Yes		Current year + 3 years	SECURE DISPOSAL
2.4.14	Part time fee claims	Yes		Current year + 6 years	SECURE DISPOSAL

2.4.15	Pay packet receipt by employee	Yes		Current year + 2 years	SECURE DISPOSAL
2.4.16	Payroll awards	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.17	Payroll – gross/net weekly or monthly	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.18	Payroll reports	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.19	Payslips – copies	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.20	Pension payroll	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.21	Personal bank details	Yes		Until superseded + 3 years If employment ceases then end of employment + 6 years	SECURE DISPOSAL
2.4.22	Sickness Records	Yes		Current year + 3 years	SECURE DISPOSAL
2.4.23	Staff returns	Yes		Current year + 3 years	SECURE DISPOSAL
2.4.24	Superannuation adjustments	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.25	Superannuation reports	Yes		Current year + 6 years	SECURE DISPOSAL
2.4.26	Tax forms P6, P11, P11D, P35, P45, P46, P48	Yes		Corporate decision to retain for current + 6 years	SECURE DISPOSAL

2.4.27	Time sheets, clock cards, flexitime	Yes		Current year + 3 years	SECURE DISPOSAL
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2.5 Other Personnel Records					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
2.5.1	Volunteer Personnel Records	Yes		Any relevant papers relating to the engagement of volunteers can be retained (as per 2.1) but only for as long as their engagement with the school lasts.	SECURE DISPOSAL
2.5.2	Governor / Trustee Records	Yes		Any relevant papers relating to the engagement of governors can be retained (as per 2.1) but only for their term of office + 1 year.	SECURE DISPOSAL
2.5.3	Third party workers, supply staff etc	Yes		The school should receive written confirmation that all checks have been undertaken, but not copies of the evidence, from the employing organisation. Where copies of such documents are received, they must not be retained by the school. The school may retain a copy of the identification documents,	SECURE DISPOSAL

				but these documents must be destroyed when the individual ceases working at the school.	
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Section 3: Financial Management of the School

3.1 Risk Management & Insurance					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
3.1.1	Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL

3.2 Asset Management					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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 & Statements including Budget Management					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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 statements and background papers	No		Life of the budget + 3 years	SECURE DISPOSAL

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 Pupil Finance

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
3.4.1	Student grant applications	Yes		Current year + 3 years	SECURE DISPOSAL
3.4.2	Pupil Premium Grant records	Yes		Date pupil leaves the provision + 6 years	SECURE DISPOSAL

3.5 Contract Management

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
3.5.1	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on contract + 12 years	SECURE DISPOSAL
3.5.2	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on contract + 6 years	SECURE DISPOSAL
3.5.3	Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL

3.56 School Fund					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
3.6.1	School fund - Cheque books	No		Current year + 6 years	SECURE DISPOSAL
3.6.2	School fund - Paying in books	No		Current year + 6 years	SECURE DISPOSAL
3.6.3	School fund - Ledger	No		Current year + 6 years	SECURE DISPOSAL
3.6.4	School fund - Invoices	No		Current year + 6 years	SECURE DISPOSAL
3.6.5	School fund – Receipts	No		Current year + 6 years	SECURE DISPOSAL
3.6.6	School fund – Bank statements	No		Current year + 6 years	SECURE DISPOSAL
3.6.7	School fund – Journey Books	No		Current year + 6 years	SECURE DISPOSAL

3.7 School Meals Management					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
3.7.1	Free School Meals Registers	Yes		Current year + 6 years	SECURE DISPOSAL
3.7.2	School Meals Registers	Yes		Current year + 3 years	SECURE DISPOSAL
3.7.3	School Meals Summary Sheets	No		Current year + 3 years	SECURE DISPOSAL

Section 4: Property Management

4.1 Health & Safety						
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life	
4.1.1	Health and Safety Policy Statements	No		Life of policy + 3 years	SECURE DISPOSAL	
4.1.2	Health and Safety Risk Assessments	No		Life of Risk assessment + 3 years	SECURE DISPOSAL	
4.1.3	Accident Reporting (Adults and Children detailed separately below)	Yes	<p>Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980</p> <p>Social Security (Claims and Payments) Regulations 1979 SI 1979 No 628</p> <p>Social Security (Claims and Payments) Regulations SI 1987 No 1968 Revokes all but Part 1 of SI 1979 No 628</p> <p>Social Administration Act 1992 Section 8</p> <p>Social Security (Claims and Payments) Amendment (No</p>			

			30 Regulations 1993 SI 1993 No 2113 Allows the information to be kept electronically		
	Adults (Over 18 years of age at time of incident)	Yes		<p>The Accident Book- BI 510 – 3 years after last entry in the book</p> <p>This includes the new format to be used from 1/1/04</p> <p>This means that, if it takes 5 years to complete, the book must be retained for a further 3 years from the last entry</p> <p>Completed pages must be kept secure with restricted access. Data Protection Act 2018 and GDPR</p>	SECURE DISPOSAL
	Children (Under 18 years of age at time of incident)	Yes		<p>The Accident Book- BI 510 – 3 years after last entry in the book</p> <p>This includes the new format to be used from 1/1/04</p> <p>This means that, if it takes 5 years to complete, the book must be retained for a</p>	SECURE DISPOSAL

				further 3 years from the last entry Completed pages must be kept secure with restricted access. Data Protect Act 2018 and GDPR	
4.1.4	Records relating to any reportable death, injury, disease or dangerous occurrence (RIDDOR). For more information see http://www.hse.gov.uk/RIDDOR/	Yes	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 SI 2013 No 1471 Regulation 12 (2)	Date of incident + 3 years provided that all records relating the incident are held on personnel file	
4.1.5	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
4.1.6	Process of monitoring of areas where employees and persons are likely to have come in to contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL
4.1.7	Process of monitoring of areas where employees and persons are likely to have come in to contact with radiation	No	The Ionising Radiation Regulations 2017 SI 2017 No 1075 Regulation 11	Last action + 50 years	SECURE DISPOSAL

			As amended by SI 2018 No 390 Personal Protective Equipment (Enforcement) Regulations 2018		
4.1.8	Fire precautions logbooks			Current year + 6 years	SECURE DISPOSAL
4.1.9	Health and safety file to show current state of building including all alterations (wiring, plumbing, building works etc), to be passed on in the case of change of ownership	No		Pass to new owner on sale or transfer of building	

4.2 Property Management

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
4.2.1	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	
4.2.2	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	
4.2.3	Leases of property leased by or to the school	No		Expiry of lease + 6 years	SECURE DISPOSAL

4.2.4	Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL
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4.3 Maintenance					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
4.3.1	All records relating to the maintenance of the school carried out by contractors	No		These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold	SECURE DISPOSAL
4.3.2	All records relating to the maintenance of the school carried out by school employees including maintenance logbooks	No		These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold	SECURE DISPOSAL

Section 5: Pupil Management

Please note that any record containing pupil information may be subject to the requirements of IICSA. Schools should implement any instruction which has been received from IICSA. The instructions from IICSA will override any guidance given in this Retention Schedule. If any school is unsure about what records should be retained, they should seek the advice of their own local authority or take independent legal advice.

5.1 Pupil's Educational Record					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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 As amended by SI 2018 No 688		
	Primary			Retain whilst the child remains at primary school	The files should follow the pupil when he/she leaves the primary school. This will include: <ul style="list-style-type: none"> • To another primary school • To a secondary school • To a pupil referral unit • To an independent school • Moving abroad <p>For those pupils moving to home schooling the file should be returned to the LA.</p>
	Secondary		Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	REVIEW

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 after reasonable attempts to contact the pupil have failed
	Internal			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 2018”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018	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 as the pupil file. Note: these records will be subject to any instruction given by IICSA	SECURE DISPOSAL – these records MUST be shredded
5.1.4	Child Protection information held in separate files	Yes	“Keeping children safe in education Statutory guidance for schools and colleges 2018”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018	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. Note: These records will be subject to any instruction given by IICSA	SECURE DISPOSAL – these records MUST be shredded

5.2 Attendance					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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 any absence (authorised or unauthorised)	Potential	Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

5.3 Special Educational Needs					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
5.3.1	Special Educational Needs files, reviews and Health and Care Plan, including advice and information provided to parents regarding educational needs and accessibility strategy	Yes	Children and Family's Act 2014: Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 31 years (Education, Health and Care Plan is valid until the individual reaches the age of 25 years – the retention period adds an additional 6 years from the end of the plan in line with the Limitation Act	SECURE DISPOSAL

Section 6: Curriculum Management

6.1 Statistics and Management Information					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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 SAT's 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
6.1.6	Internal Moderation	Yes		Academic year + 1 academic year	SECURE DISPOSAL

6.1.7	External Moderation	Yes		Until superseded	SECURE DISPOSAL
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6.2 Implementation of Curriculum

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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	No		Current Year + 1 year	
6.2.3	Class Record Books	No		Current Year + 1 year	
6.2.4	Mark Books	No		Current Year + 1 year	
6.2.5	Record of Homework set	No		Current Year + 1 year	
6.2.6	Pupil's Work	No		Where possible pupil's 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

6.3 Exams and Assessments

	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
6.3.1	Access Arrangements Information			To be returned to ALS lead/SENCO as records owner at end of the candidate's final exam series. The fully signed AAO Candidate Consent form and application outcome to be	SECURE DISPOSAL

				retained for 26 months from the date of the online application being approved.	
6.3.2	Alternative Arrangements	Site		<i>Alternative site applications made on AAO/PAAO Portal and associated paperwork to be retained until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.3	Attendance Copies	Register		<i>(Reference ICE 12... 22: ...keep signed records of the seating plan, the invigilation arrangements and the centre's copies of the attendance registers for each examination. The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later... keep a copy of the attendance register until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later)</i>	SECURE DISPOSAL

6.3.4	Awarding Body Exams Administration Information			To be retained until the current academic year update is provided.	
6.3.5	Candidates' Scripts			To be retained securely until the awarding body's earliest date for confidential disposal of unwanted scripts. <i>(Reference GR 3.15: ... ensure that when scripts that have been returned under access to scripts arrangements are no longer required, they are disposed of in a confidential manner, but no earlier than the dates specified by the awarding bodies...)</i>	SECURE DISPOSAL
6.3.6	Candidates' Work			To be logged on return to the centre and immediately returned to subject staff as records owner. To be stored safely and securely along with work that did not form part of the moderation sample (including materials stored electronically) <i>(Reference GR 3.15: ...store safely and securely all non-examination assessments, including controlled assessments, coursework or portfolios, retained in, or returned to, the centre until the deadline for a review of moderation has passed)</i>	RETURN TO CANDIDATE OR SECURE DISPOSAL

				<p><i>or until a review of moderation, an appeal or a malpractice investigation has been completed, whichever is later. This includes materials stored electronically. See paragraph 4.8 of the JCQ publication Instructions for conducting non-examination assessments https://www.jcq.org.uk/exams-office/non-examination-assessments)</i></p>	
6.3.7	Centre Consortium Arrangements For Centre Assessed Work N/A currently				
6.3.8	Certificates			<p><i>(Reference GR 5.14: ...retain all unclaimed certificates under secure conditions for a minimum of 12 months from the date of issue)</i></p>	SECURE DISPOSAL
6.3.9	Certificate Destruction Information			<p><i>(Reference GR 5.14: ...destroy any unclaimed certificates after retaining them for a minimum of 12 months. They must be destroyed in a confidential manner. Centres that do not have a means of destroying certificates confidentially may return them to the respective awarding body. A record of certificates that have been destroyed should be retained for four years from their date of destruction. However, candidates</i></p>	SECURE DISPOSAL

				<p><i>should be informed that some awarding bodies do not offer a replacement certificate service. In such circumstances the awarding body will issue a Certifying Statement of Results... (Where an awarding body issues a replacement certificate, or a Certifying Statement of Results, this will provide an accurate and complete record of results for all qualifications covered by the original certificate...)</i></p> <p><i>...return any certificates requested by the awarding bodies. Certificates always remain the property of the awarding bodies.)</i></p>	
6.3.10	Certificate Issue Information			<p><i>(Reference GR 5.14: ...distribute certificates to all candidates without delay and regardless of any disputes (such as non-payment of fees). Certificates must not be withheld without prior permission from an awarding body which will only be given in very exceptional circumstances. A record should be kept of the certificates that are issued...)</i></p>	
6.3.11	Confidential Materials: Initial Point of Delivery Logs			<p><i>(Reference GR 5.3: ...The records may be inspected by a JCQ Centre Inspector and/or awarding body staff. They might be requested in the event of concerns being reported to an</i></p>	SECURE DISPOSAL

				<i>awarding body. The records must be retained until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.)</i>	
6.3.12	Confidential Materials: Receipt, Secure Movement and Secure Storage Logs			<i>Reference GR 5.3: ...The records may be inspected by a JCQ Centre Inspector and/or awarding body staff. They might be requested in the event of concerns being reported to an awarding body. The records must be retained until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.)</i>	SECURE DISPOSAL
6.3.13	Conflicts of Interest Logs			<i>(Reference GR 5.3: ...The records may be inspected by a JCQ Centre Inspector and/or awarding body staff. They might be requested in the event of concerns being reported to an awarding body. The records must be retained until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.)</i>	SECURE DISPOSAL
6.3.14	Dispatch Logs			<i>Reference GR 5.3: ...The records may be inspected by a JCQ Centre Inspector and/or awarding body staff. They might be requested in the event of concerns being reported to an</i>	SECURE DISPOSAL

				<i>awarding body. The records must be retained until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.)</i>	
6.3.15	Entry Information			<i>Retain until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.16	Exam Question Papers			<p><i>(Reference ICE 31: Question papers must not be released to Centre personnel until after the awarding body's published finishing time for the examination or, in the case of a timetable variation, until all candidates within the centre have completed the examination. For CCEA examinations question papers must not be released until 24 hours after the published finishing time for the</i></p> <p><i>(Reference GR 6.13: ...For confidentiality purposes question papers must not be released to centre personnel for use in accordance with the above licence until after the awarding body's published finishing time for the examination or, in the case of a timetable variation, until all candidates within the centre have completed the</i></p>	

				<i>examination. This does not restrict access to question papers by authorised centre personnel for the purpose of conducting examinations...)</i>	
6.3.17	Exam Room Checklists			<i>Retain until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.18	Exam Room Incident Logs			<i>Retain until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.19	Exam Stationery			<i>(Reference ICE 30: ...return unused stationery to the secure storage facility or secure room until needed for a future examination. Surplus stationery must not be used for internal school tests, mock examinations and non-examination assessments... destroy confidentially any out-of-date stationery.)</i>	SECURE DISPOSAL
6.3.20	Examiner Reports			(Where/if provided) To be immediately provided to Head of department as records owner.	
6.3.21	Finance Information			To be returned to Finance department as records owner at the end of the academic year.	

6.3.22	Invigilation Arrangements			<i>The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.23	Invigilation and Facilitator Training Records			<i>(Reference ICE 12: A record of the content of the training given to invigilators and those facilitating an access arrangement for a candidate under examination conditions must be available for inspection and retained on file until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.)</i>	SECURE DISPOSAL
6.3.24	Moderator Reports			(Where printed from electronic copy) To be immediately provided to head of department as records owner.	
6.3.25	Moderation Returns Logs			<i>The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL

6.3.26	Overnight Supervision Information			<i>(Reference ICE 8: ...keep all completed forms available for inspection until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later. Forms may be stored electronically or in hard copy paper format and must not be sent to an awarding body, unless specifically requested...)</i>	SECURE DISPOSAL
6.3.27	Post-results Services: Confirmation of Candidate Consent Information			<i>(Reference PRS 4.2, plus appendix A and B: Consent forms or e-mails from candidates must be retained by the centre and kept for at least six months following the outcome of the clerical re-check or review of marking or any subsequent appeal. The awarding bodies reserve the right to inspect such documentation.)</i>	SECURE DISPOSAL
6.3.28	Post Results Services: Requests/Outcome information			<i>To be retained by the centre and kept for at least six months following the outcome of the clerical re-check or review of marking or any subsequent appeal. The awarding bodies reserve the right to inspect such documentation.)</i>	SECURE DISPOSAL
6.3.29	Post Results Services: Tracking Services			<i>To be retained by the centre and kept for at least six months following the outcome of the clerical re-check or review of marking or any subsequent</i>	SECURE DISPOSAL

				<i>appeal. The awarding bodies reserve the right to inspect such documentation.)</i>	
6.3.30	Private Candidate Information			<i>The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.31	Proof of Postage – Candidates’ Work			<i>(Reference ICE 29: Centres not involved in the secure despatch of exam scripts service... must obtain proof of postage/despatch for each packet of scripts, which must be retained on the centre’s files until the results are published, in case of loss or damage. (Proof of postage will provide evidence that the candidates’ scripts have left the centre. This will indicate that the scripts were written at the appointed time and that, should the scripts not be received by the awarding body/examiner, then special consideration may be possible.) ...)</i>	SECURE DISPOSAL
6.3.32	Resolving Timetable Clashes Information			<i>The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results</i>	SECURE DISPOSAL

				<i>enquiry has been completed, whichever is later.</i>	
6.3.33	Results Information			Records for current year plus previous 6 years to be retained as a minimum.	
6.3.34	Seating Plans			<i>(Reference ICE 12: ...keep signed records of the seating plan, the invigilation arrangements and the centre's copies of the attendance registers for each examination. The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later...)</i>	SECURE DISPOSAL
6.3.35	Special Consideration Information			<i>(Reference SC 6: All applications must be supported by signed evidence produced by a member of the senior leadership team. The centre must retain this evidence until after the publication of results.)</i>	SECURE DISPOSAL
6.3.36	Suspected Malpractice Reports/Outcomes			<i>The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	SECURE DISPOSAL
6.3.37	Transferred Candidate Arrangements			<i>The awarding bodies may need to refer to these records. The centre must keep them until the</i>	SECURE DISPOSAL

				<i>deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later.</i>	
6.3.38	Very Late Arrival Reports/Outcomes			<i>The awarding bodies may need to refer to these records. The centre must keep them until the deadline for reviews of marking has passed or until any appeal, malpractice or other results enquiry has been completed, whichever is later..)</i>	SECURE DISPOSAL

Section 7: Extra Curricular Activities

7.1 Educational Visits outside the Classroom					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
7.1.1	Parental consent forms for school trips where there has been no major incident	Yes		Although the consent forms could be retained for DOB + 22 years, the school may wish to complete a risk assessment to assess whether the forms are likely to be required and could make a decision to dispose of the consent forms at the end of the trip (or at the end of the academic year). This is a pragmatic approach and if in doubt the school should seek legal advice	
7.1.2	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 the rules had been followed for all pupils	

7.2 Family Liaison Officers and Home School Liaison Assistants					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
7.2.1	Day Books	Yes		Current year + 2 years then review	SECURE DISPOSAL
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	SECURE DISPOSAL
7.2.3	Referral Forms	Yes		While the referral is current	SECURE DISPOSAL
7.2.4	Contact data sheets	Yes		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL
7.2.5	Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL
7.2.6	Group Registers	Yes		Current year + 2 years	SECURE DISPOSAL

7.3 Parent Teacher Associations and Alumni Associations					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
7.3.1	Records relating the creation and management of Parent Teacher Associations and/or Alumni Associations			Current year + 6 years then review	SECURE DISPOSAL

Section 8: Central Government & Local Authority

8.1 Local Authority					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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					
	Record Type	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the records life
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