

Record Keeping & Retention Policy

Person Responsible:	**Mr D Hobson (DPO)**
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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 school. Records provide evidence for protecting the legal rights and interests of the school, and provide evidence for demonstrating performance and accountability.

1. Policy Scope

This policy applies to all records created, received or maintained by permanent and temporary staff of the school in the course of carrying out its functions. Also, by any agents, contractors, consultants or third parties acting on behalf of the school.

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 electronic format e.g. paper documents, scanned documents, e-mails which document business activities and decisions, audio and video recordings, text messages, notes of telephone and Teams chats and meeting recordings, conversations, spreadsheets, Word documents, presentations etc.

2. Responsibilities

The Board of Trustees of the school has a statutory responsibility to maintain the school records and record keeping systems in accordance with the regulatory environment specific to the school. The responsibility is delegated to the headteacher of the school.

The school's DPO will give guidance on 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.

The school will manage and document its records disposal process in line with the Records Retention Schedule included within this policy. This will help to ensure that we can meet Freedom of Information requests and respond to requests to access personal data under data protection legislation (subject access requests "SARs").

Individual staff and employees must ensure, with respect to records for which they are responsible, that they:

- Manage the school's records consistently in accordance with the school's policies and procedures;
- Properly document their actions and decisions;
- Hold personal information securely;
- Only share personal information appropriately and do not disclose it to any unauthorised third party;
- Dispose of records securely in accordance with the school's Records Retention Schedule.

3. Benefits of the Record Retention Policy

There are a number of benefits which arise from the use of a complete Retention Policy:

- Managing records against the Retention Policy is deemed to be "normal processing" under the Data Protection Act 2018, Freedom of Information Act 2000 and the UK GDPR. Provided members of staff are managing record series using the Retention Policy they cannot be found guilty of unauthorised tampering with files once a freedom of information request or a data subject access request has been made.
- Members of staff can be confident about destroying information at the appropriate time
- Information which is subject to Freedom of Information and Data Protection legislation will be available when required.
- The school is not maintaining and storing information unnecessarily. It is important that all staff bear in mind, when creating documents and records of any sort (and particularly email), that at some point in the future those documents and records could be disclosed - whether as a result of litigation or investigation, or because of a subject access request under the DPA. The watchwords of record-keeping are therefore accuracy, clarity, professionalism and objectivity.

4. Relationship with existing policies

This policy has been drawn up within the context of:

- Data Protection policy
- Acceptable Use Policy
- Photographic and Video Policy
- Confidentiality Policy

5. Pupil Records

School is under a duty to maintain a pupil record for each pupil. The 'Pupil Record' comprising the educational and curricula record, is seen as the core record charting the individual pupil's progress through the education system, and should accompany them throughout their school career. This record will serve as the formal record of their academic achievements, other skills and abilities, and progress in school.

Recording and disclosure of information

Pupil records are held electronically on the MIS system and in CPOMS. School may also keep some records in paper format.

All information must be easy to find, accurately and objectively recorded and expressed in a professional manner as pupils and parents have a right of access to their educational record via two possible routes:

- A request for an educational record.
  The Education (Pupil Information) (England) Regulations 2005, states that the pupil record must be provided to parents within 15 school days of a request where the pupil is enrolled in a maintained school. This provision does not apply to Academies, independent schools etc;
- Requests for information by pupils, or their parents are to be treated as subject access requests under Data Protection legislation.

Records not forming part of the pupil record

The following record types will be stored separately to the main pupil record, as they are usually subject to shorter retention periods (please see the Retention Schedule section); they will not be forwarded to the pupil's next school:

- Attendance Registers and Information (electronically held on MIS system)
- Absence (authorised) notes and correspondence
- Parental consent forms for trips/outings
- Accident forms (a copy can be placed on the pupil record if it is a major incident)
- Medicine consent and administering records (this is the school's record)
- Copies of birth certificates, passports, etc.
- Generic correspondence with parents about minor issues (i.e. 'Dear Parent')
- Pupil work, drawings, etc.
- Previous data collection forms which have been superseded (there is no need to retain these)
- Photography (image) consents (this is the school's record).

Information stored electronically

Those principles relevant to paper records will apply to those pupil records stored electronically. The school information management system will incorporate features to enable elements of the electronic pupil record to be deleted in accordance with retention schedules, whilst the remainder of the record remains intact.

Storage and Security

All pupil records and associated information will be stored securely to maintain confidentiality whilst keeping information accessible to those authorised to see it. Electronic records will have appropriate security and access controls in place; equally paper records will be kept in lockable storage areas with restricted access. Not everyone in school has a need to access all of the information held about a pupil; this is particularly relevant to child protection information.

Transferring Pupil Records

School will ensure swift transfers of information to the pupil's new school to ensure appropriate decisions can be made regarding a pupil, using relevant and accurate information.

Weeding

The pupil record will not be weeded before transfer, unless any duplicates or records with a short retention period have been included; these can be removed and securely destroyed.

Transfer Process

The following will be transferred to the next school within 15 school days of receipt of confirmation that a pupil is registered at another school:

- Common Transfer File (CTF) from the School Information Management System via the school2school system when used
- Any elements of the Pupil Record, held in any format, not transferred as part of the CTF
- SEN or other support service information, including behaviour, as only limited information may be included in the CTF.

This will be included within the CPOMS information transfer

- Child Protection information; this will be sent as soon as possible by the Designated Safeguarding Lead (DSL) or a member of their team to their equivalent at the new school.

School will ensure the information is kept secure and traceable during transfer:

- Records may be delivered or collected in person, with signed confirmation for tracking purposes
- Pupil Records will not be sent by post. If the use of post is absolutely necessary, they will be sent by 'Special Delivery Guaranteed' or via a reputable and secure courier to a pre-informed named contact, along with a list of the enclosed files. The new school should sign a copy of the list to confirm receipt of the files and securely return to the our school

If held electronically, records may be sent to a named contact via secure encrypted e-mail, or other secure transfer method.
If the pupil is transferring to an independent school or a post- 16 establishment, we will transfer copies of relevant information only and retain the original full record as the last known school.

If a request is received to transfer the Pupil Record or other information about a pupil to a school outside of the UK and/or to countries without an adequacy decision, we will contact our Data Protection Officer for further advice.

Retention and Disposal
Retention - Transferring school

Responsibility for maintaining the pupil record passes to the next school. Schools may wish to retain the information about the pupil for a short period to allow for any queries or reports to be completed or where linked records in the school information management system have not yet reached the end of their retention period and deleting would cause problems. In this case, records will not be held any longer than 6 months from the date of transfer.

Certain elements of the record may need to be retained for longer, for example if litigation is pending, or for transfer to the Local Record Office, in accordance with the Retention Schedule.

Limitation periods may be dis-applied altogether by courts in the case of certain crimes or associated breaches of care (e.g. historic abuse), whether a charge is brought by the police or a school is sued under a private claim. It is not always possible to try a case where the evidence is inadequate, including due to a lack of corporate memory (e.g. records and witnesses): but generally the courts and police will expect to see a record, and inferences may be drawn otherwise.

In many cases these records will comprise personal or sensitive personal data (e.g. health or criminal allegations): in which case, even justifiable reasons to keep records for many years will need to be weighed against personal rights. Historical high-profile cases in the field of child protection probably make a cautious approach to record retention advisable and, from a DPA perspective, easier for the School to justify retention for long periods. But the longer data is retained, and the more sensitive material is kept on file, the greater – and potentially more serious – the risk of security breach.

Retention –Last known school

The last known or final school is responsible for retaining the Pupil Record. The school is the final or last known school if:

- A secondary phase and the pupil left at 16 years old or for post-16 or independent education, or;
- It is a school at any point and the pupil left for elective home education, they are missing from education or have left the UK.

The Pupil Record should be retained as a whole for 25 years from the date of birth of the pupil, after which time, if no longer required, it can be deleted or destroyed. SEN and other support service records can be retained for a longer period of 31 years to enable defence in a "failure to provide a sufficient education" case.

If our school wishes to retain data for analysis or statistical purposes, it will be done in an anonymised fashion.

Disposal

Pupil records will contain personal and confidential information and so must be destroyed securely. Electronic copies will be securely deleted and hard copies disposed of as confidential waste.

6. Information Audits

School will undertake and record an annual information audit. The information audit is a record of the following:

- What information is retained
- Why information is retained
- What type of information it is
- How information is processed and shared
- Where information is stored
- What the relevant retention period is
- Who the 'responsible owners' or day-to-day users are

The information audit enables the school to continually update our asset register.

7. Disposal of records

Managing Records Retention

The fifth data protection principle states that "Personal data must be kept for no longer than is necessary for the purpose for which it is processed". Therefore, all school records, in all formats, are subject to an applicable retention period, as defined by business, statutory, regulatory, legal or historical requirements.

The schools DPO is designated as our school records manager, with responsibility for ensuring records are retained, reviewed and destroyed in accordance with requirements, and as soon as possible once their lifespan has expired. Reviews will determine whether records are to be selected for permanent preservation, destroyed, digitised to an electronic format or retained for ongoing business or legal purposes.

All records in all formats are assigned a retention period and disposal date, either upon creation or when they cease to be in active use, in accordance with the Retention Policy. A system has been implemented to routinely identify records as soon as they reach their disposal date. This forms part of an electronic record-keeping system or a manual system.

Disposal will be carried out in a timely manner to:

- Ensure compliance with business and legal retention requirements
- Improve the efficiency of the record keeping system
- Free up storage space
- Reduce associated storage and management costs

Destruction will include all backup and duplicate copies, in all formats. This is especially vital for personal information which may be kept in various hybrid record keeping systems.

Principles of Disposal

School has agreed a standard procedure for the safe disposal of records and all staff are reminded of this. If retention periods are not complied with, material will still have to be provided if a Data Subject Access request or Freedom of Information request is received, and could also result in a data breach.

The disposal method must be applicable to the content and format of the information. Paper and electronic records should be disposed of separately, i.e. floppy disks, CDs, DVDs, tapes, USBs, etc. should not be put into confidential waste containers containing paper as they require different disposal methods and could damage shredding equipment.

Destruction must be undertaken in a way that preserves the confidentiality of the information and which makes it permanently unreadable or unable to be reconstructed or re-instated. Special care should be taken when destroying personal, sensitive or commercial information and confidentiality should be paramount at all stages of the process.

Destruction of Records

All hard copies of official records and those containing personal data will be destroyed using confidential methods, rather than being placed in general waste bins or skips, which could result in a data breach. School ensure that information is either shredded using a UK GDPR compliant contractor or, if we shred on site, then a cross cutting shredder is used.. A process is agreed and followed to ensure that information security is maintained at all times.

Legal hold provision

Records scheduled for destruction must not be destroyed when;

- Litigation is anticipated or ongoing
- Safeguarding investigations are active
- Police investigations are underway
- A SAR, FOI request, complaint or audit is in progress

Disposal audit trail

A disposal audit trail should be held for any sensitive/special category data disposed of. The audit trail document should

include;

- Record category
- Destruction date
- Authorizing officer
- Disposal method

Retention Guidelines

1 Board of Trustees

This section contains retention periods connected to the work and responsibilities of the Board of Trustees.

For further information about governance records please see: "The constitution of governing bodies of maintained schools Statutory guidance for governing bodies of maintained schools and local authorities in England August 2017"

1.1 Management of Board of Trustees					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
1.1.1	Instruments of government		For the life of the school	Consult local archives before disposal	
1.1.2	Trusts and endowments		For the life of the school	Consult local archives before disposal	
1.1.3	Records relating to the election of parent and staff governors not appointed by the trustees		Date of election + 6 months	SECURE DISPOSAL	Yes
1.1.4	Records relating to the appointment of co-opted trustees		Provided that the decision has been recorded in the minutes, the records relating to the appointment can be destroyed once the co-opted trustee has finished their term of office (except where there have been allegations concerning children). In this case retain for 25 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.1.5	Records relating to the election of chair and vice chair		Once the decision has been recorded in the minutes, the records relating to the election can be destroyed	SECURE DISPOSAL	Yes
1.1.6	Scheme of delegation and terms of reference for committees		Until superseded or whilst relevant [Schools may wish to retain these records for reference purposes in case decisions need to be justified]	These could be offered to the archives if appropriate	
1.1.7	Meetings schedule		Current year	STANDARD DISPOSAL	
1.1.8	Agendas - principal copy		Where possible the agenda should be stored with the principal set of the minutes	Consult local archives before disposal	Potential
1.1.9	Minutes - principal set (signed)		Although generally kept for the life of the organisation, the Local Authority is only required to make these available for 10 years from the date of the meeting	Consult local archives before disposal	Potential

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.1.10	Reports made to the trustees' meeting which are referred to in the minutes		Although generally kept for the life of the organisation, the Local Authority is only required to make these available for 10 years from the date of the meeting	Consult local archives before disposal	Potential
1.1.11	Register of attendance at Full Trustee board meetings		Date of last meeting in the book + 6 years	SECURE DISPOSAL	Yes
1.1.12	Papers relating to the management of the annual parents' meeting		Date of meeting + 6 years	SECURE DISPOSAL	Yes
1.1.13	Agendas - additional copies		Date of meeting	STANDARD DISPOSAL	
1.1.14	Records relating to Trustee Monitoring Visits		Date of the visit + 3 years	SECURE DISPOSAL	Yes
1.1.15	Annual Reports required by the DoE		Date of report + 10 years	SECURE DISPOSAL	
1.1.16	All records relating to the conversion of schools to Academy status		For the life of the organisation	Consult local archives before disposal	

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.1.17	Records relating to complaints made to and investigated by the Board of Trustees or head teacher		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	Yes
1.1.18	Correspondence sent and received by the Board of Trustees or head teacher		General correspondence should be retained for current year + 3 years	SECURE DISPOSAL	Potential
1.1.19	Action plans created and administered by the Board of Trustees		Until superseded or whilst relevant	SECURE DISPOSAL	
1.1.20	Policy documents created and administered by the Board of Trustees		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.]		

1.2	Trustee Management				
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
1.2.1	Records relating to the appointment of a clerk to the Board of Trustees		Date on which clerk appointment ceases + 6 years	SECURE DISPOSAL	Yes
1.2.2	Records relating to the terms of office of serving trustees, including evidence of appointment		Date appointment ceases + 6 years		Yes
1.2.3	Records relating to trustee declaration against disqualification criteria		Date appointment ceases + 6 years	SECURE DISPOSAL	Yes
1.2.4	Register of business interests		Date appointment ceases + 6 years	SECURE DISPOSAL	Yes
1.2.5	Trustees 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		
1.2.6	Records relating to the training required and received by Trustees		Date Trustee steps down + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.2.7	Records relating to the induction programme for new trustees		Date appointment ceases + 6 years	SECURE DISPOSAL	Yes
1.2.8	Records relating to DBS checks carried out on clerk and members of the Board of Trustees		Date of DBS check + 6 months	SECURE DISPOSAL	Yes
1.2.9	Trustee personnel files		Date appointment ceases + 6 years	SECURE DISPOSAL	Yes

2 Management of the School

This section contains retention periods connected to the processes involved in managing the school, including Human Resources, Financial Management, Payroll and Property Management.

2.1 Head Teacher and Senior Management Team					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
2.1.1	Log books of activity in the school maintained by the Head Teacher		Date of last entry in the book + minimum of 6 years, then review	These could be of permanent historical value and should be offered to the County Archives Service if appropriate	Potential
2.1.2	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies		Date of the meeting + 3 years then review annually, or as required if not destroyed	SECURE DISPOSAL	Potential
2.1.3	Reports created by the Head Teacher or the Management Team		Date of the report + a minimum of 3 years then review annually or as required if not destroyed	SECURE DISPOSAL	Potential

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.1.4	Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities which do not fall under any other category		Current academic year + 6 years then review annually, or as required if not destroyed	SECURE DISPOSAL	Potential
2.1.5	Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities		Current year + 3 years	SECURE DISPOSAL	Potential
2.1.6	Professional development plans		These should be held on the individual's personnel record. If not then termination of employment + 6 years	SECURE DISPOSAL	Potential
2.1.7	School development plans		Life of the plan + 3 years	SECURE DISPOSAL	

2.2	Operational Administration				
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
2.2.1	General file series which do not fit under any other category		Current year + 5 years, then review	SECURE DISPOSAL	Potential
2.2.2	Records relating to the creation and publication of the school brochure or prospectus		Current academic year + 3 years	The school could preserve a copy for their archive otherwise STANDARD DISPOSAL	
2.2.3	Records relating to the creation and distribution of circulars to staff, parents or pupils		Current academic year + 1 year	STANDARD DISPOSAL	
2.2.4	School Privacy Notice which is sent to parents as part of GDPR compliance		Until superseded + 6 years		
2.2.5	Consents relating to school activities as part of GDPR compliance (for example, consent to be sent circulars or mailings)		Consent will last whilst the pupil attends the school, it can therefore be destroyed when the pupil leaves	SECURE DISPOSAL	Yes
2.2.6	Newsletters and other items with a short operational use		Current academic year + 1 year [Schools may decide to archive one copy]	STANDARD DISPOSAL	
2.2.7	Visitor management systems (including electronic systems, visitors books and signing-in sheets)		Last entry in the visitors book + 6 years (in case of claims by parents or pupils about various actions).	SECURE DISPOSAL	Yes
2.2.8	Walking bus registers		Date of register + 6 years	SECURE DISPOSAL	Yes

2.3 Human Resources					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
Recruitment					
2.3.1	All records leading up to the appointment of a headteacher		Unsuccessful attempts. Date of appointment plus 6 months. Add to personnel file and retain until end of appointment + 6 years, except in cases of negligence or claims of child abuse then at least 15 years	SECURE DISPOSAL	Yes
2.3.2	All records leading up to the appointment of a member of staff/governor – unsuccessful candidates		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL	Yes
2.3.3	Pre-employment vetting information – DBS Checks – successful candidates	DBS Update Service Employer Guide June 2014; Keeping Children Safe in Education.2018 (Statutory Guidance from DoE) Sections 73, 74	Application forms, references and other documents – for the duration of the employee's employment + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Recruitment					
2.3.4	Forms of proof of identity collected as part of the process of checking "portable" enhanced DBS disclosure		Where possible this process should be carried out using the on-line system. If it is necessary to take a copy of documentation then it should be retained on the staff personal file.	SECURE DISPOSAL	Yes
2.3.5	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom – successful candidates	An Employer's Guide to Right to Work Checks [Home Office, May 2015]	Where possible these documents should be added to the staff personnel file [see below], but if they are kept separately then the Home Office requires that the documents are kept for termination of employment + not less than 2 years	SECURE DISPOSAL	Yes
Operational Staff Management					
2.3.6	Staff personnel file	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	Yes
2.3.7	Annual appraisal/assessment records		Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Operational Staff Management					
2.3.8	Sickness absence monitoring		Sickness records are categorised as sensitive data. There is a legal obligation under statutory sickness pay to keep records for sickness monitoring. Sickness records should be kept separate from accident records. It could be argued that where sickness pay is not paid then current year + 3 years is acceptable, whilst if sickness pay is made then it becomes a financial record and current year + 6 years applies. The actual retention may depend on the internal auditors. Most seem to accept current year + 3 years as being acceptable as this gives them, 'benefits' and Inland Revenue have time to investigate if they need to	SECURE DISPOSAL	Yes
2.3.9	Staff training – where the training leads to continuing professional development		Length of time required by the professional body	SECURE DISPOSAL	Yes
2.3.10	Staff training – except where dealing with children, e.g. first aid or health and safety		This should be retained on the personnel file [see 2.3.1 above]	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Operational Staff Management					
2.3.11	Staff training – where the training relates to children (e.g. safeguarding or other child related training)		Date of the training + 40 years [This retention period reflects that the IICSA may wish to see training records as part of an investigation]	SECURE DISPOSAL	Yes
Disciplinary and Grievance Processes					
Where schools are in any doubt as to which categories disciplinary records fall under, then HR or legal advice should be sought from the Local Authority.					
2.3.12	Records relating to any allegation of a child protection nature against a member of staff	"Keeping children safe in education Statutory guidance for schools and colleges"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018"	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 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 These records must be shredded	Yes
2.3.13	Disciplinary proceedings				Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Disciplinary and Grievance Processes					
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 of an important event in the course of the employer's relationship with the employee. Should the same employee be accused of similar misconduct five years down the line, and them 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 and 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. Employers should, therefore, be careful not to confuse the expiry of a warning for disciplinary purposes with a requirement to destroy all reference to its existence in the personnel file. One danger is that the disciplinary procedure itself often gives the impression that, at the end of the effective period for the warning, the warning will be "removed from the file". This or similar wording should be changed to make it clear that, while the warning will not remain active in relation to future disciplinary matters, a record of what has occurred will be kept.					
	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 related to child protection then see above, otherwise dispose of at the conclusion of the case	SECURE DISPOSAL	

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
2.3.14	Absence record		Current year + 3 years	SECURE DISPOSAL	Yes
2.3.15	Batches	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.16	Bonus sheets	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 3 years	SECURE DISPOSAL	Yes
2.3.17	Car allowance claims	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 3 years	SECURE DISPOSAL	Yes
2.3.18	Car loans	Taxes Management Act 1970 Income and Corporation Taxes 1988	Completion of loan + 6 years	SECURE DISPOSAL	Yes
2.3.19	Car mileage output	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.20	Elements		Current year + 2 years	SECURE DISPOSAL	Yes
2.3.21	Income tax form P60		Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
2.3.22	Insurance	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.23	Maternity payment		Current year + 3 years	SECURE DISPOSAL	Yes
2.3.24	Members allowance register	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.25	National Insurance – schedule of payments	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.26	Overtime	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 3 years	SECURE DISPOSAL	Yes
2.3.27	Part time fee claims	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.28	Pay packet receipt by employee		Current year + 2 years	SECURE DISPOSAL	Yes
2.3.29	Payroll awards		Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
2.3.30	Payroll – gross/net weekly or monthly	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.31	Payroll reports	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.32	Payslips – copies	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.33	Pension payroll	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.34	Personal bank details	If employment ceases then end of employment + 6 years	Until superseded + 3 years	SECURE DISPOSAL	Yes
2.3.35	Sickness records		Current year + 3 years	SECURE DISPOSAL	Yes
2.3.36	Staff returns		Current year + 3 years	SECURE DISPOSAL	Yes
2.3.37	Superannuation adjustments	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
	Superannuation reports	Taxes Management Act 1970 Income and Corporation Taxes1988	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.38	Tax forms P6/P11/ P11D/P35/P45/P46/ P48	The minimum requirement - as stated in Inland Revenue Booklet 490 - is for at least 3 years after the end of the tax year to which they apply. Originals must be retained in paper/ electronic format. It is a corporate decision to retain for current year + 6 years. Employees should retain records for 22 months after current tax year	Current year + 6 years	SECURE DISPOSAL	Yes
2.3.39	Time sheets/clock cards/flexitime		Current year + 3 years	SECURE DISPOSAL	Yes

2.4 Health and Safety

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.4.1	Health and safety policy statements		Life of policy + 3 years	SECURE DISPOSAL	
2.4.2	Health and safety risk assessments		Life of risk assessment + 3 years provided that a copy of the risk assessment is stored with the accident report if an incident has occurred	SECURE DISPOSAL	
2.4.3	Accident reporting records relating to individuals who are over 18 years of age at the time of the incident	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 Social Security (Claims and Payments) Regulations 1979. SI 1979 No 628 Social Security (Claims and Payments) Regulations SI 1987 No 1968 Revokes all but Part 1 of SI 1979 No 628 Social Security Administration Act 1992 Section 8. Social Security (Claims and Payments) Amendment (No 30 Regulations 1993 SI 1993 No 2113 Allows the information to be kept electronically	The Accident Book – BI 510 - 3 years after last entry in the book This includes the new format to be used from 1/1/04 This means that, if it takes 5 years to complete, the book must be retained for a further 3 years from the last entry Completed pages must be kept secure with restricted access. Data Protection Act 2018 and GDPR	SECURE DISPOSAL	Yes

2.4 Health and Safety

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.4.4	Accident reporting records relating to individuals who are under 18 years of age at the time of the incident	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 Social Security (Claims and Payments) Regulations 1979. SI 1979 No 628 Social Security (Claims and Payments) Regulations SI 1987 No 1968 Revokes all but Part 1 of SI 1979 No 628 Social Security Administration Act 1992 Section 8. Social Security (Claims and Payments) Amendment (No 30 Regulations 1993 SI 1993 No 2113 Allows the information to be kept electronically	The Accident Book – BI 510 - 3 years after last entry in the book This includes the new format to be used from 1/1/04 This means that, if it takes 5 years to complete, the book must be retained for a further 3 years from the last entry Completed pages must be kept secure with restricted access. Data Protection Act 2018 and UKGDPR	SECURE DISPOSAL	Yes
2.4.5	Records relating to any reportable death, injury, disease or dangerous occurrence (RIDDOR). For more information see http://www.hse.gov.uk/RIDDOR/	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 to the incident are held on personnel file [see 2.4.2 above]	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.4.6	Control of Substances Hazardous to Health (COSHH)	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)	Date of incident + 40 years	SECURE DISPOSAL	
2.4.7	Process of monitoring of areas where employees and persons are likely to have come into contact with asbestos	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL	
2.4.8	Process of monitoring of areas where employees and persons are likely to have come into contact with radiation. Maintenance records or controls, safety features and PPE --- Dose assessment and recording	The Ionising Radiation Regulations 2017. SI 2017 No 1075 Regulation 11 As amended by SI 2018 No 390 Personal Protective Equipment (Enforcement) Regulations 2018	2 years from the date on which the examination was made and that the record includes the condition of the equipment at the time of the examination. --- To keep the records made and maintained (or a copy of these records) until the person to whom the record relates has or would have attained the age of 75 years, but in any event for at least 30 years from when the record was made	SECURE DISPOSAL	
2.4.9	Fire Precautions log books		Current year + 3 years	SECURE DISPOSAL	

2.4 Health and Safety					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
2.4.10	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		Pass to new owner on sale or transfer of building		
2.5 Financial Management					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
Risk Management and Insurance					
2.5.1	Employer's Liability Insurance Certificate		Closure of the school + 40 years [May be kept electronically]	SECURE DISPOSAL To be passed to the Local Authority if the school closes	
Asset Management					
2.5.2	Inventories of furniture and equipment		Current year + 6 years	SECURE DISPOSAL	
2.5.3	Burglary, theft and vandalism report forms		Current year + 6 years	SECURE DISPOSAL	
Accounts and Statements (including budget management)					
2.5.4	Annual accounts		Current year + 6 years	STANDARD DISPOSAL	
2.5.5	Loans and grants managed by the school		Date of last payment on the loan + 12 years then review	SECURE DISPOSAL	

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Accounts and Statements (including budget management)					
2.5.6	All records relating to the creation and management of budgets, including the annual budget statement and back-ground papers		Life of the budget + 3 years	SECURE DISPOSAL	
2.5.7	Invoices, receipts, order books and requisitions, delivery notices		Current financial year + 6 years	SECURE DISPOSAL	
2.5.8	Records relating to the collection and banking of monies		Current financial year + 6 years	SECURE DISPOSAL	
2.5.9	Records relating to the identification and collection of debt		Final payment of debt + 6 years	SECURE DISPOSAL	
Pupil Finance					
2.5.10	Student Grant applications		Current year + 3 years	SECURE DISPOSAL	Yes
2.5.11	Pupil Premium Fund records		Date pupil leaves the provision + 6 years	SECURE DISPOSAL	Yes
Contract Management					
2.5.12	All records relating to the management of contracts under seal	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL	
2.5.13	All records relating to the management of contracts under signature	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL	
2.5.14	Records relating to the monitoring of contracts		Life of contract + 6 or 12 years	SECURE DISPOSAL	

2.5 Financial Management

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
School Fund					
2.5.15	School Fund - Cheque books		Current year + 6 years	SECURE DISPOSAL	
2.5.16	School Fund - Paying in books		Current year + 6 years	SECURE DISPOSAL	
2.5.17	School Fund – Ledger		Current year + 6 years	SECURE DISPOSAL	
2.5.18	School Fund – Invoices		Current year + 6 years	SECURE DISPOSAL	
2.5.19	School Fund – Receipts		Current year + 6 years	SECURE DISPOSAL	
2.5.20	School Fund - Bank statements		Current year + 6 years	SECURE DISPOSAL	
2.5.21	School Fund – Journey Books		Current year + 6 years	SECURE DISPOSAL	
School Meals Management					
2.5.22	Free school meals registers (where the register is used as a basis for funding)		Current year + 6 years	SECURE DISPOSAL	Yes
2.5.23	School meals registers		Current year + 3 years	SECURE DISPOSAL	Yes
2.5.24	School meals summary sheets		Current year + 3 years	SECURE DISPOSAL	Yes

2.6 Property Management					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
Property Management					
2.6.1	Title deeds of properties belonging to the school		These should follow the property unless the property has been registered with the Land Registry		
2.6.2	Plans of property belonging to the school		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. See 2.4.10		
2.6.3	Leases of property leased by or to the school		Expiry of lease + 6 years	SECURE DISPOSAL	
2.6.4	Records relating to the letting of school premises		Current financial year + 6 years	SECURE DISPOSAL	
Maintenance					
2.6.5	All records relating to the maintenance of the school carried out by contractors		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. See 2.4.10	SECURE DISPOSAL	
2.6.6	All records relating to the maintenance of the school carried out by school employees, including maintenance log books		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. See 2.4.10	SECURE DISPOSAL	

3 Pupil Management

This section contains retention periods connected to the processes involved in managing a pupil's journey through school, including the admissions process.

3.1 Admissions Process

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.1.1	All records relating to the creation and implementation of the School Admissions Policy	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	
3.1.2	Admissions – if the admission is successful	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	Yes
3.1.3	Admissions – if the appeal is unsuccessful	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	Yes
3.1.4	Register of Admissions	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 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 an archive record as often schools receive enquiries from past pupils to confirm the dates they attended the school or to transfer these records to the appropriate County Archives Service	

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.1.5	Admissions – Secondary Schools – Casual		Current year + 1 year	SECURE DISPOSAL	Yes
3.1.6	Proofs of address supplied by parents as part of the admissions process	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	Yes
3.1.7	Supplementary information form including additional information such as religion, medical conditions etc.				Yes
3.1.7.1	For successful admissions		This information should be added to the pupil file	SECURE DISPOSAL	
3.1.7.2	For unsuccessful admissions		Until appeals process completed (GDPR)	SECURE DISPOSAL	

3.2 Pupil's Educational Record

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Please note that any record containing pupil information may be subject to the requirements of the 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.					
3.2.1	Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437 As amended by SI 2018 No 688			Yes
3.2.1.1	Primary		Retain whilst the child remains at the primary school	The file should follow the pupil when he/she leaves the primary school. This will include: • To another primary school • To a secondary school • To a pupil referral unit	
3.2.1.2	Secondary	Limitation Act 1980 (Section 2)	Date of birth of the pupil + 25 years	REVIEW	
3.2.2	Examination Results – pupil copies				Yes
3.2.2.1	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	
3.2.2.2	Internal		This information should be added to the pupil file		

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.2.3	Child protection information held on pupil file	"Keeping children safe in education Statutory guidance for schools and colleges"; "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 of time as the pupil file. Note: These records will be subject to any instruction given by IICSA	SECURE DISPOSAL These records must be shredded	Yes
3.2.4	Child protection information held in separate files	"Keeping children safe in education Statutory guidance for schools and colleges"; "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	Yes

3.3 Attendance					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
Please note that any record containing pupil information may be subject to the requirements of the 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.					
3.3.1	Attendance Registers	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 3 years after the date on which the entry was made.	SECURE DISPOSAL	Yes
3.3.2	Correspondence relating to any absence (authorised or unauthorised)	Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL	Potential

3.3 Attendance					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
Please note that any record containing pupil information may be subject to the requirements of the 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.					

3.4.1	Special Educational Needs files, reviews and Education, Health and Care Plan, including advice and information provided to parents regarding educational needs and accessibility strategy	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	Yes

4 Curriculum and Extra Curricular Activities

This section contains retention periods connected to the processes involved in managing the curriculum and extra-curricular activities.

4.1 Statistics and Management Information

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
4.1.1	Curriculum returns		Current year + 3 years	SECURE DISPOSAL	No
4.1.2	Examination Results (school's copy)		Current year + 6 years	SECURE DISPOSAL	Yes
4.1.2.1	SATS records				Yes
4.1.2.2	Results		The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all of the whole year's SATs results. These could be kept for current year + 6 years to allow suitable comparison	SECURE DISPOSAL	
4.1.2.3	Examination Papers		The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL	
4.1.3	Published Admission Number (PAN) Reports		Current year + 6 years	SECURE DISPOSAL	Yes

4.1	Statistics and Management Information				
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
4.1.4	Value Added and Contextual Data		Current year + 6 years	SECURE DISPOSAL	Yes
4.1.5	Self-Evaluation Forms			SECURE DISPOSAL	Yes
4.1.5.1	Internal moderation		Academic year plus 1 academic year	SECURE DISPOSAL	Yes
4.1.5.2	External moderation		Until superseded	SECURE DISPOSAL	Yes

4.2	Implementation of Curriculum				
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
4.2.1	Schemes of work		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	
4.2.2	Timetable		Current year + 1 year		
4.2.3	Class record books		Current year + 1 year		
4.2.4	Mark books		Current year + 1 year		
4.2.5	Record of home-work set		Current year + 1 year		
4.2.6	Pupil's work		Where possible, the 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	

For information relating to records concerning the running of educational visits outside the classroom please see the guidance provided by https://oeapng.info/

4.3 School Trips					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
4.3.1	Parental consent forms for school trips where there has been no major incident		Although the consent forms could be retained for Date of birth + 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 achool should seek legal advice	SECURE DISPOSAL	Yes
4.3.2	Parental permission slips for school trips – where there has been a major incident	Limitation Act 1980 (Section 2)	Date of birth of the pupil involved in the incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	SECURE DISPOSAL	Yes

4.4 School Support Organisations					
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
Family Liaison Officers and Home School Liaison Assistants					
4.4.1	Day books		Current year + 2 years then review	SECURE DISPOSAL	Yes
4.4.2	Reports for outside agencies - where the report has been included on the case file created by the outside agency		Whilst child is attending school and then destroy	SECURE DISPOSAL	Yes
4.4.3	Referral forms		While the referral is current	SECURE DISPOSAL	Yes
4.4.4	Contact data sheets		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL	Yes
4.4.5	Contact database entries		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL	Yes
4.4.6	Group registers		Current year + 2 years	SECURE DISPOSAL	Yes
Parent Teacher Associations and Old Pupils Associations					
4.4.7	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations		Current year + 6 years then review	SECURE DISPOSAL	

Central Government and Local Authority

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

5.1	Local Authority				
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
5.1.1	Secondary Transfer Sheets (primary)		Current year + 2 years	SECURE DISPOSAL	Yes
5.1.2	Attendance returns		Current year + 1 year	SECURE DISPOSAL	Yes
5.1.3	School census returns		Current year + 5 years	SECURE DISPOSAL	
5.1.4	Circulars and other information sent from the local authority		Operational use	SECURE DISPOSAL	

5.2	Central Government				
	Basic file description	**Statutory Provisions**	**Retention Period [Operational]**	**Action at end of the administrative life of the record**	**Personal Information**
5.2.1	OFSTED reports and papers where a physical copy is held		Life of the report then review	SECURE DISPOSAL	
5.2.2	Returns made to central government		Current year + 6 years	SECURE DISPOSAL	
5.2.3	Circulars and other information sent from central govern-ment		Operational use	SECURE DISPOSAL	