

MAT Data Retention Schedule

| | Basic File Description | Data Protection Issues | Statutory Provisions | Retention Period | Action at the end of the administrative life of the record | Responsible for secure disposal (record of disposal to be kept) |
|------------------------------------|---|--|----------------------|---|--|---|
| 1 MANAGEMENT OF THE SCHOOLS | | | | | | |
| 1.1 GOVERNING BODY | | | | | | |
| 1.1.1 | Agendas for Governing Body meetings | | | One copy should be retained with the master set of minutes. All other copies can be disposed of | Secure Disposal | MAT Clerk |
| 1.1.2 | Minutes of Governing Body meetings | LAB minutes are public documents, however where there is an associated confidential note there may be data protection issues if the confidential item relates to individual(s) | | Permanent | If the school is unable to store these then they should be offered to the County Archives Service | MAT Clerk |
| 1.1.3 | Reports presented to the Governing Body | There may be data protection issues if the report deals with confidential issues relating to staff | | Reports should be kept for a minimum of 6 years. However, if the minutes refer directly to individual reports then the reports should be kept permanently | SECURE DISPOSAL or retain with the signed set of the minutes | MAT Clerk |
| 1.1.5 | Instruments of Government including Articles of Association | No | | Permanent | These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes. | MAT Clerk |
| 1.1.6 | Trusts and Endowments managed by the Governing Body | No | | Permanent | These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes. | MAT Clerk |
| 1.1.7 | Action plans created and administered by the Governing Body | No | | Life of the action plan + 3 years | SECURE DISPOSAL | MAT Clerk |
| 1.1.8 | Policy documents approved by the Governing Body | No | | Until superseded (however where considered relevant a copy will be archived for the life of the academy) | SECURE DISPOSAL | MAT Clerk |

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| 1.1.9 | Records relating to complaints dealt with by the Governing Body | Yes | | Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes | SECURE DISPOSAL | MAT Clerk |
| 1.1.10 | Governor Exclusion Hearing papers | Yes | Statutory guidance on suspension & permanent exclusion 2023 | Date of the Hearing plus 6 months, unless an IRP panel has been requested. Governors Hearing minutes and outcome correspondence to be placed on the pupil file | SECURE DISPOSAL | Hearing Clerk |
| 1.1.11 | Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies | No | | Date proposal accepted or declined + 3 years | SECURE DISPOSAL | LAB Clerk |
| 1.2. PRINCIPALS AND SENIOR MANAGEMENT TEAM | | | | | | |
| 1.2.1 | Minutes of Academy SLT 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 | SBM |
| 1.2.2 | Reports created by the Principal or the Management Team | There may be data protection issues if the report refers to individual pupils or members of staff | | Date of the report + a minimum of 3 years then review | SECURE DISPOSAL | SBM |
| 1.2.3 | General Records created by Principals, Deputy Principals, members of the Senior Leadership Team or 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 | SECURE DISPOSAL | SBM |
| 1.2.4 | General Correspondence created by Principals, deputy Principals, 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 | SBM |

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| 1.2.5 | Professional Development Plans | Yes | | Life of the plan + 6 years | SECURE DISPOSAL | SBM |
| 1.2.6 | Schools Development Plan | No | | Life of the plan + 6 years | SECURE DISPOSAL | SBM |
| 1.3 ADMISSION PROCESS | | | | | | |
| 1.3.1 | All records relating to the creation and implementation of the Academy Admissions' Policy (including also Endeavour House Admission Policy) | No | School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014 | Life of the policy + 3 years then review | SECURE DISPOSAL | OM, Admission Footings Co-ordinator Family |
| 1.3.2 | Admissions – if the admission is successful | Yes | School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014(Limitation Act 1980) | Date of admission + 1 year (until the child is 21 of age) | SECURE DISPOSAL | OM Admissions Co-ordinator Family Footings |
| 1.3.3 | Admissions – if the appeal is unsuccessful | Yes | School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014 | Resolution of case + 1 year | SECURE DISPOSAL | OM, Admission Co |

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| 1.3.4 | Register of admissions | Yes | School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014 | Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made. | 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. | OM, Admission Co |
| 1.3.5 | Supplementary Information form including additional information such as religion, medical conditions etc | Yes | | | | OM, Admission Co |
| 1.3.6 | For successful admissions | | | This information should be added to the pupil file | SECURE DISPOSAL | OM, Admission Co |
| 1.3.7 | For unsuccessful admissions | | | Until appeals process completed | SECURE DISPOSAL | OM, Admission Co |

1.4 OPERATIONAL ADMINISTRATION

| | | | | | | |
|-------|--|-----|--|------------------------------------|--|----|
| 1.4.1 | General Records & Files | No | | Current year + 3 years then REVIEW | SECURE DISPOSAL | OM |
| 1.4.2 | Records relating to the creation and publication of the school brochure or prospectus | No | | Current year + 3 years | STANDARD DISPOSAL | OM |
| 1.4.3 | Records relating to the creation and distribution of circulars to staff, parents or pupils | No | | Current year + 1 year | STANDARD DISPOSAL | OM |
| 1.4.4 | Newsletters and other items with a short operational use | No | | Current year + 1 year | STANDARD DISPOSAL Schools may wish to keep newsletters for longer or permanently | OM |
| 1.4.5 | Visitors' Books and Signing in Sheets | Yes | | Current year + 6 years then REVIEW | SECURE DISPOSAL | OM |
| 1.4.6 | Records relating to the creation and management of Parent Forums | No | | Current year + 6 years then REVIEW | SECURE DISPOSAL | OM |

2. HUMAN RESOURCES

2.1 RECRUITMENT

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| 2.1.1 | All records leading up to the appointment of a new member of staff – unsuccessful candidates | Yes | | Date of appointment of successful candidate + 13 months | SECURE DISPOSAL | OM /MAT admin) |
| 2.1.2 | Pre-employment vetting information – DBS Checks | No | DBS Update Service Employer Guide June 2014: Keeping children safe in education. July 2015 (Statutory Guidance from Dept. of Education) Sections 73, 74 | The 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 | SECURE DISPOSAL | HR/OM |
| 2.1.3 | Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure | Yes | | Kept in staff file 6 years after termination of employment | SECURE DISPOSAL | HR/OM |
| 2.1.4 | 2.1.6 Pre-employment vetting information – Evidence proving the right to work in the United Kingdom4 | Yes | An employer’s guide to right to work checks [Home Office May 2015] | Kept in staff file 6 years after termination of employment | SECURE DISPOSAL | HR/OM |
| 2.2 OPERATIONAL STAFF MANAGEMENT | | | | | | |
| 2.2.1 | Staff personal files | Yes | Limitation Act 1980 (Section 2) | Termination of Employment + 6 years | SECURE DISPOSAL | OMs |
| 2.2.2 | Timesheets | Yes | | Current year + 6 years | SECURE DISPOSAL | OM's |
| 2.2.3 | Annual Appraisals/Assessment Records | Yes | | Current year + 6 years | SECURE DISPOSAL | Principals |
| 2.2.4 | Any Data seen by HR only such as E&D information | Yes | | Termination of Employment + 6 years for successful employees - Termination of employment + 12 months for unsuccessful candidates | SECURE DISPOSAL | HR |
| 2.2.5 | Payroll Information | Yes | Taxes Management 1970 | Wages and salaries records - termination of employment + 6 years | SECURE DISPOSAL | Payroll officer |
| 2.2.6 | Staff Photos for ID purposes are kept in staff files | Yes | | Termination of Employment + 6 years | SECURE DISPOSAL | OMs |
| 2.2.7 | Staff Photos for Marketing Purposes | Yes | | Termination of Employment + 6 years | SECURE DISPOSAL | Comm's Officer OM |
| 2.2.8 | Pandemic related information (vaccines etc) | Yes | | Short term risk management needs as defined by Group Director | SECURE DISPOSAL | OMs/ SBMs |

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| 2.3 MANAGEMENT OF DISCIPLINARY AND GRIEVANCE PROCESSES | | | | | | |
| 2.3.1 | Allegation of a child protection nature against a member of staff including where the allegation is unfounded ⁵ | Yes | "Keeping children safe in education Statutory guidance for schools and colleges March 2015"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015" | 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 founded they are to be kept on the file | SECURE DISPOSAL These records must be shredded | Principal, HR |
| 2.3.2 | Disciplinary Proceedings | Yes | | Termination of employment + 6 years All disciplinary proceedings will be kept in HR only accessed files in case of legal proceedings | SECURE DISPOSAL [If warnings are placed on personal files they will be kept on the personal file until expiry date - after which they must be weeded from the file and only HR will retain a copy until termination of employment + 6 years] | HR |
| 2.3.3 | Grievances | Yes | | Person making the grievance (records retained on their file Retention Period Termination of Employment + 6 year – Subject of the Grievance if upheld (record kept Termination of employment + 6 years | SECURE DISPOSAL [If grievances are not upheld they will be removed from personal files and only HR will retain a copy until termination of employment + 6 years] | HR |
| 2.4 HEALTH AND SAFETY | | | | | | |
| 2.4.1 | Health and Safety Policy Statements | No | | Permanently | SECURE DISPOSAL | SBM FM |
| 2.4.2 | Health and Safety Risk Assessments | No | | Life of RA + 3 years Date of incident + 3 years | SECURE DISPOSAL | SBM FM |
| 2.4.3 | Records relating to accidents/injury at work | Yes | RIDDORS 1995 | Unless the incident involved a child or young person Up to 21 years of age | SECURE DISPOSAL | SBM |

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| 2.4.4 | Accident Reporting | Yes | Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 | | SECURE DISPOSAL | SBM |
| | Adults | Yes | | Date of the incident + 6 years (unless it involves a Hazardous Substances) | SECURE DISPOSAL | SBM |
| | Children | Yes | | DOB of the child + 25 years (up to 21 years of age) | SECURE DISPOSAL | SBM |
| 2.4.5 | Control of Substances Hazardous to Health (COSHH) | No | Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2) | Current year + 40 years | SECURE DISPOSAL | FM |
| 2.4.6 | Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos | No | Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19 | Last Action + 40 years | SECURE DISPOSAL | FM |
| 2.4.7 | Process of monitoring of areas where employees and persons are likely to have become in contact with radiation | No | | Last Action + 50 years | SECURE DISPOSAL | FM |
| 2.4.8 | Process of monitoring areas where employees and person are likely to be in contact with lead | No | | Last Action + 40 years | SECURE DISPOSAL | FM |
| 2.4.9 | Fire Precautions log books | No | | Current Year + 6 Year | SECURE DISPOSAL | FM |

2.5 PAYROLL AND PENSIONS

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| 2.5.1 | Maternity pay records | Yes | Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567) | Current Year + 6 Year | SECURE DISPOSAL | Payroll HR |
| 2.5.2 | Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995 | Yes | Taxes Management 1970 - Retirement benefits schemes (information powers) Regulations 1995 | Current Year + 6 Year | SECURE DISPOSAL | Payroll HR |
| 3. FINANCIAL MANAGEMENT OF THE SCHOOLS | | | | | | |
| 3.1 RISK MANAGEMENT AND INSURANCE | | | | | | |
| 3.1.1 | Employer's Liability Insurance Certificate | No | | Closure of the school + 40 years | SECURE DISPOSAL | TBM SBM |
| 3.2 ASSET MANAGEMENT | | | | | | |
| 3.2.1 | Inventories of furniture and equipment | No | Section 221 Companies Act 1985 | Current year + 6 Years | SECURE DISPOSAL | FM /IT |
| 3.2.2 | Burglary, theft and vandalism report forms | No | Section 221 Companies Act 1985 | Current year + 6 Years | SECURE DISPOSAL | SBM |
| 3.3 ACCOUNTS AND STATEMENT INCLUDING BUDGET MANAGEMENT | | | | | | |
| 3.3.1 | Annual Accounts | No | | Current year + 6 years | STANDARD DISPOSAL | TBM |
| 3.3.2 | Loans and grants managed by the school | No | | Date of last payment on the loan + 12 years then REVIEW | SECURE DISPOSAL | SBM |
| 3.3.3 | Student Grant applications | Yes | | Current year + 6 years | SECURE DISPOSAL | SBM |
| 3.3.4 | All records relating to the creation and management of budgets including the Annual Budget statement and background papers | No | | Life of the budget + 6 years | SECURE DISPOSAL | SBM TBM |
| 3.3.5 | Invoices, receipts, order books and requisitions, delivery notices | No | | Current Financial Year + 6 years | SECURE DISPOSAL | SBM |

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| 3.3.6 | Records relating to the collection and banking of monies | No | | Current Financial Year + 6 years | SECURE DISPOSAL | SBM |
| 3.3.7 | Records relating to the identification and collection of debt | No | | Current Financial Year + 6 years | SECURE DISPOSAL | SBM |
| 3.4 CONTRACT MANAGEMENT | | | | | | |
| 3.4.1 | All records relating to the management of contracts under seal | No | Limitation Act 1980 | Last payment on the contract + 12 years | SECURE DISPOSAL | SBM TBM |
| 3.4.2 | All records relating to the management of contracts under signature | No | Limitation Act 1980 | Last payment on the contract + 6 years | SECURE DISPOSAL | SBM TBM |
| 3.4.3 | Records relating to the monitoring of contracts | No | | Current year + 6 years | SECURE DISPOSAL | FM |
| 3.6 SCHOOL MEALS MANAGEMENT | | | | | | |
| 3.6.1 | Free school meals register | Yes | | Current year + 3 years | SECURE DISPOSAL | OM |
| 3.6.2 | School meals register | Yes | | Current year + 3 years | SECURE DISPOSAL | OM |
| 3.6.3 | School Meals Summary Sheets | No | | Current year + 3 years | SECURE DISPOSAL | OM |
| 4. PROPERTY MANAGEMENT | | | | | | |
| 4.1 PROPERTY MANAGEMENT | | | | | | |
| 4.1.1 | Title deeds of properties belonging to the school | No | | PERMANENT These should follow the property unless the property has been registered with the Land Registry | | N/A |
| 4.1.2 | Plans of property belong to the school | No | | These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold. | | N/A |
| 4.1.3 | Leases of property leased by or to the school | No | | Expiry of lease + 6 years | SECURE DISPOSAL | CEO |
| 4.1.4 | Records relating to the letting of school premises | No | | Current year + 6 years | SECURE DISPOSAL | SBM |

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| 4.2 MAINTENANCE | | | | | | |
| 4.2.1 | All records relating to the maintenance of the school carried out by contractors | No | | Current year + 6 years | SECURE DISPOSAL | FM |
| 4.2.2 | All records relating to the maintenance of the school carried out by school employees including maintenance log books | No | | Current year + 6 years | SECURE DISPOSAL | FM |
| 5. PUPIL MANAGEMENT | | | | | | |
| 5.1 PUPIL EDUCATIONAL RECORDS | | | | | | |
| 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 | See below | SECURE DISPOSAL | Family FootingsOM |
| a | Primary | No | | Retain whilst the child remains at the primary school | <p>The file should follow the pupil when he/she leaves the primary school. This will include:</p> <ul style="list-style-type: none"> • to another primary school • to a secondary school • to a pupil referral unit <p>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</p> <p>If the pupil transfers to an independent school, transfers to home schooling or leaves the country the file should be returned to the Local Authority to be retained for the statutory retention period.</p> <p>Primary Schools do not ordinarily have sufficient storage space to store records for pupils who have not transferred in the normal way. It makes more sense to transfer the record to the Local Authority as it is more likely that the pupil will request the record from the Local Authority</p> | Admission Co-ord OM Family Footings |

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| b | Secondary | | Limitation Act 1980 (Section 2) | Date of Birth of the pupil + 25 years | SECURE DISPOSAL | Family FootingsOM |
| c | Death of a pupil | No | Limitation Act 1980 (Section 2) | Date of death of the pupil + 14 years | SECURE DISPOSAL | Family FootingsOM |
| 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. | Exams Officer |
| | Internal | | | This information should be added to the pupil file | | |
| This review took place as the Independent Inquiry on Child Sexual Abuse was beginning. In light of this, it is recommended that all records relating to child | | | | | | |
| 5.1.3 | Child Protection information held on pupil file | Yes | <p>“Keeping children safe in education Statutory guidance for schools and colleges September 2016”.</p> <p>“Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”</p> | 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. | SECURE DISPOSAL – these records MUST be shredded | Safeguarding lead |
| 5.1.4 | Child protection information held in separate files | Yes | <p>“Keeping children safe in education Statutory guidance for schools and colleges September 2016”</p> <p>“Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”</p> | <p>DOB of the child + 25 years then review</p> <p>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 - Unless transferred to new establishment</p> | SECURE DISPOSAL – these records MUST be shredded | Safeguarding lead |
| PS: | | | | | | |

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| 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 (3) years after the date on which the entry was made. | SECURE DISPOSAL | OM |
| 5.2.2 | Correspondence relating to authorized absence | Yes | Education Act 1996 Section 7 | Current academic year + 2 years | SECURE DISPOSAL | OM |
| 5.3. SPECIAL EDUCATIONAL NEEDS | | | | | | |
| 5.3.1 | Special Educational Needs files, reviews and Individual Education Plans | Yes | Limitation Act 1980 (Section 2) | Date of Birth of the pupil + 25 years | REVIEW NOTE: This retention period is the minimum retention period that any pupil file should be kept. Some authorities choose to keep SEN files for a longer period of time to defend themselves in a "failure to provide a sufficient education" case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented. | OM Family Footings |
| 5.3.2 | Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement | Yes | Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1 | Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] | SECURE DISPOSAL unless the document is subject to a legal hold | OM Family Footings and Admissions |
| 5.3.3 | Advice and information provided to parents regarding educational needs | Yes | Special Educational Needs and Disability Act 2001 Section 2 | Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] | SECURE DISPOSAL unless the document is subject to a legal hold | OM Family Footings and Admissions |
| 5.3.4 | Accessibility Strategy | Yes | Special Educational Needs and Disability Act 2001 Section 14 | Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] | SECURE DISPOSAL unless the document is subject to a legal hold | OM Family Footings and Admissions |
| 6. CURRICULUM MANAGEMENT | | | | | | |

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| 6.1 STATISTICS AND MANAGEMENT INFORMATION | | | | | | |
| 6.1.1 | Curriculum returns | No | | Current year + 3 years | SECURE DISPOSAL | Exams Officer |
| 6.1.2 | Examination Results (Schools Copy) | Yes | | Current year + 6 years | SECURE DISPOSAL | Exams Officer |
| | SATS records – Results | Yes | | The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all the whole year SATs results. | SECURE DISPOSAL | Exams Officer |
| | Examination Papers | Yes | | These could be kept for current year + 6 years to allow suitable comparison The examination papers should be kept until any appeals/validation process is complete | SECURE DISPOSAL | Exams Officer |
| 6.1.3 | Published Admission Number (PAN) Reports | Yes | | Current year + 6 years | SECURE DISPOSAL | Principal |
| 6.1.4 | Value Added and Contextual Data | Yes | | Current year + 6 years | SECURE DISPOSAL | Principal |
| 6.1.5 | Self Evaluation Forms | Yes | | Current year + 6 years | SECURE DISPOSAL | Principal |
| 6.2 IMPLEMENTATION OF CURRICULUM | | | | | | |
| 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 | Curric Lead T &L |
| 6.2.2 | Timetable | No | | Current year + 1 year | | Curric Lead T &L |
| 6.2.3 | Class Record Books | No | | Current year + 1 year | | Curric Lead T &L |
| 6.2.4 | Mark Books | No | | Current year + 1 year | | Curric Lead T &L |
| 6.2.5 | Record of homework set | No | | Current year + 1 year | | Curric Lead T &L |

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| 6.2.6 | Pupils' Work | No | | Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the school's policy then current year + 1 year | SECURE DISPOSAL | Teacher |
| 7. EXTRA CURRICULAR ACTIVITIES | | | | | | |
| 7.1 EDUCATIONAL VISITS OUTSIDE THE CLASSROOMS | | | | | | |
| 7.1.1 | Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Primary Schools | No | Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice". | Date of visit + 14 years | SECURE DISPOSAL | Ed Visit Co-ord OM |
| 7.1.2 | Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools | No | Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice". | Date of visit + 10 years | SECURE DISPOSAL | Ed Visit Co-ord OM |
| 7.1.3 | Parental consent forms for school trips where there has been no major incident | Yes | | Conclusion of the trip | Although the consent forms could be retained for DOB + 22 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time. | Ed Visit Co-ord OM |

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| 7.1.4 | Parental permission slips for school trips – where there has been a major incident | Yes | Limitation Act 1980 (Section 2) | DOB of the pupil involved in the Incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils | SECURE DISPOSAL | Ed Visit Co-ord |
| 7.2 FAMILY LIAISON OFFICERS AND HOME SCHOOL LIAISON OFFICERS | | | | | | |
| 7.2.1 | Day Books | Yes | | Current year + 2 years then review | SECURE DISPOSAL | Family Footings |
| 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 | Family Footings |
| 7.2.3 | Referral forms | Yes | | While the referral is current | SECURE DISPOSAL | Family Footings |
| 7.2.4 | Contact data sheets | Yes | | Current year then review, if contact is no longer active then destroy | SECURE DISPOSAL | Family Footings |
| 7.2.5 | Contact database entries | Yes | | Current year then review, if contact is no longer active then destroy | SECURE DISPOSAL | Family Footings |
| 7.2.6 | Group Registers | Yes | | Current year + 2 years | SECURE DISPOSAL | Family Footings |
| 8. CENTRAL GOVERNMENT AND LOCAL AUTHORITIES | | | | | | |
| 8.1 LOCAL AUTHORITIES | | | | | | |
| 8.1.1 | Attendance Returns | Yes | | Current year + 1 year | SECURE DISPOSAL | OM |
| 8.1.2 | School Census Returns | No | | Current year + 5 years | SECURE DISPOSAL | SBM |
| 8.1.3 | Circulars and other information sent from the Local Authority | No | | Operational use | SECURE DISPOSAL | All |
| 8.2 CENTRAL GOVERNMENT | | | | | | |
| 8.2.1 | OFSTED reports and papers | No | | Life of the report then REVIEW | SECURE DISPOSAL | Principal |
| 8.2.2 | Returns made to central government | No | | Current year + 6 Years | SECURE DISPOSAL | P or SBM |
| 8.2.3 | Circulars and other information sent from central government | No | | Operational use | SECURE DISPOSAL | ALL |

Changes at Sep 2023 review:

MAT Data Retention Schedule

| | Basic File Description | Data Protection Issues | Statutory Provisions | Retention Period | Action at the end of the administrative life of the record | Responsible for secure disposal (record of disposal to be kept) |
|--|----------------------------|------------------------|----------------------|------------------|--|---|
| | Addition of 2.2.8 | | | | | |
| | Addition of 5.1.1 point c. | | | | | |