

### **Records Management Policy And**

### **Retention/Disposal of Records Schedule**

For

### Dorchester Primary School Implemented May 2018

**Review Date – October 2023** 

Records Management Policy Appendix A

Retention/Disposal of Records

Introduction

Purpose of Schedule

Operation of Schedule

Definition of Records held by the school

Retention and Disposal Schedule



### **Records Management Policy**

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

- Scope
- Responsibilities
- Relationships with existing policies

### 1 Scope of the policy

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

#### 2 Responsibilities

- 2.1 The school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Head of the School.
- 2.2 The person responsible for records management in the school will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. They will also monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately.
- 2.3 Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines.



#### 3 This policy has been drawn up within the context of:

- The Freedom of Information Policy
- The Data Protection Policy
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

Adopted by FGB.

Appendix A

### **Retention/Disposal of Records**

### 1 – Introduction

The implementation of the retention or disposal of records at Dorchester Primary School will be in accordance with the Data Protection Policy, Freedom of Information Policy and Records Management Policy.

### 2 - Purpose of Retention/Disposal Schedule

This schedule identifies the retention and disposal arrangements for all records, whether they are in paper or digital format, created by the school. *Any records in C2K MIS System (SIMS) are being managed by C2K. Minimum retention periods for these records in SIMS are being adhered to. It is not necessary for schools to delete specific items of data from the SIMS system at this time.* 

#### **Categories of Disposal**

- Review/Closing of Records
- Destruction
- Permanent preservation



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### 3 – Operation of this Schedule

### a. <u>Review/Closing of Records</u>

Manual records should be closed as soon as they have ceased to be of active use other than for reference purposes. When a file is due to be closed the appropriate member of staff should review the file and consult the schedule marking the front cover of the file to indicate the date on which the file can be destroyed, or whether it should be selected for permanent preservation or retained by the school for research or litigation purposes. Closing a file simply means that no further papers can be added but the file can be used for reference.

### b. <u>Minimum Retention Period</u>

The minimum retention period required for each type of record is calculated from the point the file/record is closed.

#### c. <u>Destroy</u>

Where the disposal action is 'Destroy' the records should be kept for the period stated and then destroyed by the school in accordance with the directions on recycling and shredding. All records containing personal information, or sensitive policy information, should be made either unreadable or unreconstructable. Before destruction authorisation must be given by the Head teacher and the destruction recorded. The Freedom of Information Act 2000 requires the school to maintain a list of records which have been destroyed and who authorised their destruction.

#### d. <u>Permanent Preservation</u>

Where the disposal action is Permanent Preservation the records are exempt from the normal review procedures. In some cases the Public Record Office will seek transfer of files that are marked for permanent preservation.

#### e. <u>Commitment to preserving files/records</u>

The school declares that it will take measures to ensure that the records it creates will be physically well maintained and cared for while they are in its custody (i.e. until either destroyed or retained for permanent preservation).

#### f. Roles and Responsibilities

The Head teacher is responsible for ensuring that records and information systems in their areas conform to this policy and to the requirements of legislation. All members of staff are responsible for



documenting their actions and decisions in the records and for maintaining the records in accordance with good records management practice.

The role of the appointed member of staff is to ensure compliance with Records Management standards within their area of responsibility, and to co-ordinate activities aimed at ensuring that information is recorded, stored, managed and disposed of both effectively and legally.

#### EMAILS

Emails accounts are not a case management tool in itself. Generally, emails may need to fall under different retention periods (for example, an email regarding a health and safety report will be subject to a different time frame to an email which forms part of a pupil record). It is important to note that the retention period will depend on the content of the email and it is important that staff file those emails in the relevant areas to avoid the data becoming lost.



## 4– Definitions of Records held by the school in respect of each of its Functional Business Areas.

There are eight main functional business areas for which the school keeps records as follows:

- 1. Management of the School
- 2. Human Resources
- 3. Financial Management of the School
- 4. Property Management
- 5. Pupil Management
- 6. Curriculum Management
- 7. Extra-Curricular Activities
- 8. Central Government and Policy

The records contained within these functional areas provide evidence and information about its business activities that are important for the efficient operation of the school.



### **4 – SCHOOL RETENTION AND DISPOSAL SCHEDULE**

1. Management of the School – this section contains retention periods connected to the general management of the school. This covers the work of the Governing Body, Head teacher and Senior Leadership Team, admissions process and operational administration.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record
1.1 Governing Body				
Agendas for GB meetings	If dealing with confidential issues relating to staff		1 copy to be retained with the master set of minutes. All other copies disposed of	SECURE DISPOSAL
Minutes of GB meetings	If dealing with confidential issues relating to staff Principal Set Inspection Copies		PERMANENT Date of meeting +3 years	N/A SHRED
Reports presented to GB	If dealing with confidential issues relating to staff		Min 6 years. If minutes refer directly to individual reports then the reports should be kept permanently	SECURE DISPOSAL or kept with the signed set of the minutes
Meeting papers relating to the annual parents' meeting held under section 33 of the Education Act 2002	Νο	Education Act 2002, Section 33	Date of meeting + min 6 years	SECURE DISPOSAL
Instruments of Government including Articles of Assn	No		PERMANENT	Retained in school whilst school open then archived
Trusts & Endowments managed by GB	No		PERMANENT	Retained in school whilst school open then archived
Action Plans crated and administered by GB	No		Life of Plan + 3 years	SECURE DISPOSAL
Policy documents created and administered by GB	Yes		Life of Policy + 3 years	SECURE DISPOSAL
Records relating to complaints dealt with	Yes		Date of resolution of complaint + min 6	SECURE DISPOSAL

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by the GB			years then review for further retention in case of contentious disputes	
Annual Reports created under the requirements of the Education (Governors Annual Reports(England) (Amendment) Regs 2002	Νο	Education (Governors Annual Reports) (England) (Amendment) Regs 2002	Date of Report + 10 years	SECURE DISPOSAL
Proposals concerning change of status of maintained school including specialist status schools and academies	No		Date proposal accepted or declined + 3 years	SECURE DISPOSAL
1.2 Head teacher and Sen	ior Leadership Team			
Log books of activity in the school maintained by HT	If reference to individual pupils or members of staff		Date of last entry in book + min 6 years then review	Could be of permanent historical value
Minutes of SLT meetings and the meetings of other internal administrative bodies	If reference to individual pupils or members of staff		Date of meeting + 3 years then review	SECURE DISPOSAL
Reports created by HT or Management Team	If reference to individual pupils or members of staff		Date of report + min 3 years then review	SECURE DISPOSAL
Records created by HT, DHTs and other members of staff with admin responsibilities	If reference to individual pupils or members of staff		Current academic year + 6 years then review	SECURE DISPOSAL
Correspondence created by HTs, DHTs and other members of staff with admin resp.	If correspondence refers to individual pupils or members of staff		Date of correspondence + 3 years then review	SECURE DISPOSAL
Professional Development Plans	Yes		Life of Plan + 6 years	SECURE DISPOSAL
School Development Plans	No		Life of Plan + 3 years	SECURE DISPOSAL
1.3 Admissions Process				
Records relating to creation and implantation of School's Admissions' Policy	No	School Admissions Code. Statutory Guidance for Admission	Date of Admission + 1 year	SECURE DISPOSAL

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		Authorities,		
		governing bodies,		
		local authorities,		
		schools adjudicators		
		and admission		
		appeals panels Dec		
		2014		
Admissions – if	Yes	As above	Date of admission + 1	SECURE DISPOSAL
admission is successful	res	AS above		SECORE DISPOSAL
Admissions if the	Yes	As above	year Resolution of case + 1	SECURE DISPOSAL
appeal is unsuccessful	165	AS above	year	SECORE DISPOSAL
Register of Admissions	Yes	School attendance:	Every entry in the	REVIEW
Register of Authissions	105	Departmental	admission register	Schools may wish to
		advice for	must be preserved	consider keeping the
		maintained schools,	for a period of three	register
		academies,	years after the date	_
		independent	on which the entry	permanently as often schools
		schools and local	was made	
		authorities Oct 2014	wasmaue	receive enquiries
		autionities Oct 2014		from past pupils to confirm dates they
				-
			0 1.1	attended the school
Admissions – Secondary School – casual	Yes		Current + 1 year	SECURE DISPOSAL
		Cale a l'Aduciacia y a	Comment of Assess	
Proofs of address	Yes	School Admissions	Current + 1 year	SECURE DISPOSAL
supplied by parents as		Code		
part of the admissions		Statutory guidance for admission		
process		authorities,		
		governing bodies, local authorities,		
		school adjudicators		
		and admission		
		appeals panels Dec 2014		
Supplementary	Yes	2014	For SUCCESSFUL	SECURE DISPOSAL
Supplementary information form	105			SECORE DISPUSAL
including additional			admissions – add to pupil record file	
information such as			pupilitecoru lile	
religion, medical			For UNSUCCESSFUL	SECURE DISPOSAL
conditions etc.			admissions – until	JECONE DISPUSAL
conditions etc.			appeals process	
			completed	
1.4 Operational Administr	ration		compieteu	
General file series	No		Current year + 5	SECURE DISPOSAL
	-		years then REVIEW	
			-	

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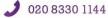
creation and publication of the school brochure or prospectus		years	DISPOSAL
Records relating to the creation and distribution of circulars to staff, parents or pupils	No	Current year + 1 year	STANDARD DISPOSAL
Newsletters and other items with a short operational use	No	Current year + 1 year	STANDARD DISPOSAL
Visitors' Books and Signing in Sheets	Yes	Current year + 6 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and management of PTAs and/or Old Pupils Associations	No	Current Year + 6 years then REVIEW	SECURE DISPOSAL

2. Human Resources – this section deals with all matters of HR management within the school.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record
2.1 Recruitment				
All records leading up to the appointment of a new Head teacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
All records leading up to the appointment of a new member of staff – UNSUCCESSFUL candidate	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
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 personnel file and all other information retained for 6 months	SECURE DISPOSAL
Pre-employment vetting information – DBS checks	No	DBS Update Service Employer Guide June	The school does not have to keep copies	

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		2014: KCSIE statutory guidance	of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months	
Proofs of identity collected as part of the process of checking 'portable' enhanced DBS disclosure	Yes		Where possible these should be checked and a note kept of what was seen and what has been checked. If felt necessary to keep copy documentation then place on individual personnel file	
Pre-employment vetting information – evidence proving right to work in the UK	Yes	An employer's guide to right to work checks (Home Office May 2015)	Where possible these documents should be added to the staff personnel file but if kept separately then the Home Office requires that the documents are kept for termination of employment plus not less than 2 years	
2.2 Operational Staff Manag	ement		· ·	L
Staff Personnel File	Yes	Limitation Act 1980 (Section 2)	Termination of employment + 6 years	SECURE DISPOSAL
Timesheets	Yes		Current + 6 years	SECURE DISPOSAL
Annual appraisal/assessment records	Yes		Current year + 5 years	SECURE DISPOSAL
2.3 Management of Disciplin	nary and Grievance	Processes		
Allegation of a child protection nature, against a member of staff including where the allegation is unfounded	Yes	KCSIE Statutory Guidance for Schools and Colleges. Working to Safeguard Children. A guide to inter- agency working to safeguard and promote the welfare	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	SECURE DISPOSAL These records must be shredded on site by a senior member of staff

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Disciplinary Proceedings Oral Warning	Yes	of children March 2015	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 Date of warning + 6 months	SECURE DISPOSAL - if placed on personnel file must
Written warning Level 1			Date of warning + 6 months	be removed As above
Written warning Level 2			Date of warning + 12 months	As above
Final Warning			Date of Waring + 18 months	As above
Case not found			If the incident is child protection related then see above, otherwise dispose of at conclusion of case	SECURE DISPOSAL
2.4 Health & Safety			-	•
Health & Safety Policy Statements	No		Life of Policy + 3 years	SECURE DISPOSAL
Health & Safety Risk Assessments	No		Life of Risk Assessment + 3 years	SECURE DISPOSAL
Records relating to accident/injury at work	Yes		Date of incident + 12 years. In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL
Accident Reporting	Yes	Social Security (Claims & Payments) Regs 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980		
ADULTS			Date of the incident + 6 years	SECURE DISPOSAL
CHILDREN			DOB of the child + 25 years	SECURE DISPOSAL

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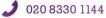
Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regs 2002. SI 2002 No 2677 Regulation 1.1; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Reg 18 (2)	Current year + 40 years	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	No	Control of Asbestos at Work Regs 2012 SI 1012 No 632 Regulation 19	Last Action + 40 years	SECURE DISPOSAL
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
Fire Precaution Log books	No		Current year + 6 years	SECURE DISPOSAL
2.5 Payroll and Pensions				
Maternity pay records	Yes	Statutory Maternity Pay (General) Regs 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	SECURE DISPOSAL
Records held under retirement benefits schemes (information powers) Regs 1995	Yes		Current year + 6 years	SECURE DISPOSAL

### 3. **Financial Management of the School** – this section deals with all the aspects of the financial management of the school including the administration of school meals.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record		
3.1 Risk Management & I	3.1 Risk Management & Insurance					
Employer's Liability	No		Closure of the	SECURE DISPOSAL		
Insurance Certificate			school + 40 years			

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3.2 Asset Management				
Inventories of furniture	No		Current year + 6	SECURE DISPOSAL
and equipment			years	
Burglary, theft and	No		Current year + 6	SECURE DISPOSAL
vandalism report forms			years	
3.3 Accounts and statem	ents including budge	t management	,	
Annual accounts	No		Current year + 6	STANDARD DISPOSAL
			years	
Loans and grants	No		Date of last	SECURE DISPOSAL
managed by the school	-		payment on loan +	
0,			12 years then	
			REVIEW	
Student grant	Yes		Life of budget + 3	SECURE DISPOSAL
applications			years	
All records relating to	No		Life of budget + 3	SECURE DISPOSAL
the creation and			years	
management of budgets				
including the annual				
budget statement and				
background papers				
Invoices, receipts, order	No		Current financial	SECURE DISPOSAL
books and requisitions,			year+ 6 years	
delivery notices				
Records relating to the	No		Current financial	SECURE DISPOSAL
collection and banking			year + 6 years	
of monies				
Records relating to the	No		Current financial	SECURE DISPOSAL
identification and			year + 6 years	
collection of debt				
3.4 Contract Managemer	nt			
All records relating to	No	Limitation Act 1980	Last payment on	SECURE DISPOSAL
the management of			the contract + 12	
contracts under seal			years	
All contracts relating to	No	Limitation Act 1980	Last payment on	SECURE DISPOSAL
the management of			the contract + 6	
contracts under			years	
signature				
Records relating to the	No		Current year + 2	SECURE DISPOSAL
monitoring of contracts			years	
3.5 School Fund	1			
School Fund Cheque	No		Current year + 6	SECURE DISPOSAL
Books			years	
School Fund Paying In	No		Current year + 6	SECURE DISPOSAL
Books			years	

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School Fund – ledger	No	Current year + 6 years	SECURE DISPOSAL
School Fund – invoices	No	Current year + 6 years	SECURE DISPOSAL
School Fund – receipts	No	Current year + 6 years	SECURE DISPOSAL
School Fund – bank statements	No	Current year + 6 years	SECURE DISPOSAL
School Fund – journey books	No	Current year + 6 years	SECURE DISPOSAL
3.6 School Meals Manag	ement	·	•
Free School Meals registers	Yes	Current year + 6 years	SECURE DISPOSAL
School Meals Registers	Yes	Current year + 3 years	SECURE DISPOSAL
School Meals Summary Sheets	No	Current year + 3 years	SECURE DISPOSAL

#### 4. Property Management – this section covers the management of buildings and property.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record
4.1 Property Manageme	nt	•	•	
#title Deeds of properties belonging to the school	No		PERMANENT These follow the property unless the property has been registered with the Land	
Plans of property belonging to the School	No		Registry 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	
Leases of property leased by or to the school	No		Expiry of Lease + 6 years	SECURE DISPOSAL
Records – letting of premises	No		Current financial year + 6 yrs	SECURE DISPOSAL
4.2 Property Maintenand	ce			

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All records relating to the maintenance of the school carried out by contractors	No	Current year + 6 years	SECURE DISPOSAL
All records relating to the maintenance of the school carried out by school employees including maintenance log books	Νο	Current year + 6 years	SECURE DISPOSAL

5. **Pupil management** – This section includes all records which are created during the time a pupil spends at the school. For information about accident reporting see under Health and Safety above.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record
5.1 Pupil's Educational Re	ecord			
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		
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 If the pupil dies whilst at primary school the file should be returned to the LA to be retained for the statutory retention period. If the pupil transfers

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Secondary Examination Results –	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	to an independent school, transfers to home schooling or leaves the country the file should be returned to the LA as above. SECURE DISPOSAL
pupil copies Public			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board
Internal			This information should be added to the pupil file	
Child Protection information held on pupil file	Yes	KCSIE 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	If any records relating to CP 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
Child Protection information held in separate files	Yes	As above	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 LA Social Services Record	SECURE DISPOSAL – these records MUST be shredded
5.2 Attendance		·	·	·
Attendance registers	Yes	School attendance: Departmental advice for maintained schools, academies,	Every entry in the attendance register must be preserved for a period of 3	SECURE DISPOSAL

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Correspondence relating to authorised absence <b>5.3 Special Educational</b> Needs		independent schools and local authorities Oct 2014 Education Act 1996 Section 7	years after the date on which the entry was made Current academic year + 2 years	SECURE DISPOSAL
SEN files, reviews and Individual Education Plans (IEPs)	Yes	Limitation Act 1980 (Section 2)	Date of birth of the pupil + 25 years	REVIEW. The retention period is the minimum that any pupil file should be kept. Some authorities choose to keep for a longer period. 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.
Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996 SEN and Disability Act 2001 Section 1	Date of birth of the pupil plus 25 years (this would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold
Advice and information provided to parents regarding educational needs	Yes	SEN 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
Accessibility Strategy	Yes	SEN 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

### 6. Curriculum Management

Basic File Description	Data Protection Issues	Statutory Provisions	<b>Retention Period</b>	Action at end of administrative life of
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			record
6.1 Statistics and Mana	gement Information		
Curriculum returns	No	Current year + 3 years	SECURE DISPOSAL
Examination Results	Yes	Current year + 6 years	SECURE DISPOSAL
(School copy)			
SATS records	Yes		
Results		The SATs results should	SECURE DISPOSAL
		be recorded on the	
		pupil's educational file	
		and will therefore be	
		retained until the pupil	
		reaches 25 years of	
		age. The school may	
		wish to keep a	
		composite record of all	
		the whole year results.	
		These could be kept for	
		current year + 6 years	
		to allow comparison.	
Examination Papers		The papers should be	SECURE DISPOSAL
		kept until any	
		appeals/validation	
		process complete	
Published Admission	Yes	Current year + 6 years	SECURE DISPOSAL
Number (PAN) Reports			
Value Added and	Yes	Current year + 6 years	SECURE DISPOSAL
Contextual Data			
Self-Evaluation Forms	Yes	Current year + 6 years	SECURE DISPOSAL
6.2 Implementation of	Curriculum		-
Schemes of Work	No	Current year + 1 year	It may be appropriate
Timetable	No	Current year + 1 year	to review these
Class Record Books	No	Current year + 1 year	records at the end of
Mark Books	No	Current year + 1 year	each year and allocate
Record of homework	No	Current year + 1 year	further retention
set			period or SECURE
			DISPOSAL
Pupils' work	No	Where possible pupils	SECURE DISPOSAL
		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	

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### 7. Extra Curriculum Activities

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record			
	7.1 Educational Visits outside the Classroom						
Records created by schools to obtain approval to run a visit outside the classroom – PRIMARY SCHOOLS	No	Outdoor Education Advisers' Panel National guidance	Date of Visit + 14 years	SECURE DISPOSAL			
Records created by schools to obtain approval to run a visit outside the classroom – SECONDARY SCHOOLS	No	As above	Date of visit + 10 years	SECURE DISPOSAL			
Parental consent forms for school trips where they has been no major incident	Yes		Conclusion of trip	Although the 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			
Parental permission slips for school trips – where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	DOB of the pupil involved in the incident + 25 years. The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils				
7.2 Walking Bus		•	<u>. · · ·</u>				
Walking Bus Registers	Yes		Date of register + 3 years. This takes into account the fact that if there is an incident	SECURE DISPOSAL (If these records ae retained electronically any back-up copies should be destroyed at			

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		requiring an accident report the register will be submitted with the accident report and kept for the period of time required or accident reporting.	the same time)
7.3 Family Liaison Office			
Day Books	Yes	Current year + 2 years then review	
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	
Referral forms	Yes	While the referral is current	
Contact data sheets	Yes	Current year then review, if contact is no longer active then destroy	
Contact database entries	Yes	Current year then review, if contact is no longer active then destroy	
Group registers	Yes	Current year + 2 years	

**8. Central Government and Local Authority** – this section covers records created in the course of interaction between the school and Local Authority.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at end of administrative life of record
8.1 Local Authority				
Secondary Transfer	Yes		Current year + 2	SECURE DISPOSAL
Sheets (PRIMARY)			years	
Attendance Returns	Yes		Current year + 1	SECURE DISPOSAL
			year	
School Census Returns	No		Current year + 5	SECURE DISPOSAL

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		years	
Circulars and other	No	Operational use SECURE D	ISPOSAL
information sent from			
the Local Authority			
8.2 Central Government			
OFSTED reports and	No	Life of the report SECURE D	ISPOSAL
papers		then REVIEW	
Returns made to	No	Current year + 6 SECURE D	ISPOSAL
central government		years	
Circulars and other	No	Operational use SECURE D	ISPOSAL
information sent from			
central government			

Other Records	
Emails	Current year + 3 years
ССТV	1 calendar month
Privacy notices	Until replaced plus 6 years.

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