



# Data Retention Policy

GDPR

OCTOBER 2021

CONCORDIA MULTI ACADEMY TRUST

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## 1. Document Control

### Amendment History

Version No.	Date	Comments
0.1	20/12/2021	Initial Draft
0.2	11/01/2022	Reviewer updates

### Review Dates

Next Review Date
1 December 2022 (Year 1 review)

### Author(s)

Name	Role
Simon Faircloth	Chief Operating Officer

### Reviewers(s)

Name	Role
Tracy Webb	Chief Executive Officer
Exec Team	Headteachers
John Cook	Data Protection Officer

### Approver(s)

Name	Role
Simon Faircloth	Chief Operating Officer

## 2. Introduction

### Aims

This policy provides definition to Academies within Concordia Multi Academy Trust, and the Trust itself, on retention of all data relating to the operation the Trust.

This policy has been produced in accordance with the guidance produced by the DFE in April 2018 in the “GDPR Toolkit for Schools” and is in accordance with the Data Protection rules and Freedom of Information Act (2000) legislation.

The fifth data protection principle as per the data protection rules (updated for GDPR) states that:

- “Personal data processed for any purpose or purposes shall not be kept for longer than is necessary for that purpose or those purposes”

Within the Trust, leadership teams must ensure that records that are no longer required for business use are reviewed as soon as possible under the criteria set out so that only the appropriate records are destroyed.

This document determines whether records are to be selected for permanent preservation, destroyed, digitised to an electronic format or retained by the academy for research or litigation purposes.

Whatever decisions are made they need to be documented as part of the records management policy within the academy.

This document should be read in conjunction with all other policies within the Trust that relate to data management, data records and data protection.

Where the Trust has a third party who manages data, such as Arbor, Eric Wright Facilities Management or APS, the third party must retain records in line with this policy. It is the responsibility of whomever manages that relationship to ensure this is captured in any agreements and monitored throughout the duration.

### 3. Safe Destruction of Data

#### Safe Destruction of Records

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

- ⦿ Paper records should be shredded using a cross-cutting shredder
- ⦿ CDs / DVDs / Floppy Disks should be cut into pieces
- ⦿ Audio / Video Tapes and Fax Rolls should be dismantled and shredded
- ⦿ Hard Disks should be shredded and/or degaussed

Any other non-sensitive records should be bundled up and disposed of to a wastepaper merchant or disposed of in other appropriate ways. Do not put records in with the regular waste or a skip.

There are companies who can provide confidential waste bins and other services which can be purchased to ensure that records are disposed of in an appropriate way. These should only be used where it is impractical, due to volume, to shred on site.

a) Where a Trust authorised external provider is used all records should be shredded on-site or may be taken off site. The organisation must also be able to prove that the records have been destroyed by the company who should provide a Certificate of Destruction which should be retained in accordance with the Data Retention Policy.

It is important to understand that if the records are recorded as to be destroyed but have not yet been destroyed and a request for the records has been received, they MUST still be provided.

b) Where records are destroyed internally, the process must ensure that all records are recorded and authorised to be destroyed by a member of the Leadership team and records of the destruction retained.

#### Electronic Storage

It is preferred that data is stored as an electronic record, which could include scanned images, as this provides the ability to index records and delete them appropriately.

Electronic records also benefit from being part of the IT disaster recovery plan and allow for access control measures to be implemented. Control measures must be implemented to ensure that only people who need access to the data require it. It is also critical that electronic folders are secure and backed up.

#### Freedom of Information Act 2000 (FoIA 2000)

The Freedom of Information Act 2000 requires the academy to maintain a list of records which have been destroyed and who authorised their destruction

Members of staff should record at least:

- ⦿ File reference (or another unique identifier);
- ⦿ File title (or brief description)
- ⦿ Number of files and date range
- ⦿ The name of the authorising officer
- ⦿ Date action taken

Following this guidance will ensure that the academy is compliant with the Data Protection rules and the Freedom of Information Act 2000.

If you have any queries relating to this policy, please contact our Data Protection Officer and our Chief Operating Officer:

◀ John Cook  
Cooks Lawyers  
Manchester Business Park  
3000 Aviator Way  
Manchester  
M22 5TG  
01625 725000  
[john@cooklawyers.co.uk](mailto:john@cooklawyers.co.uk)

## 4. Management of the Trust

This section contains retention periods connected to the general management of the Trust. This covers the work of the Board of Trustees, the central team and operational administration.

<b>Board of Trustees</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Agendas for Trustee meetings	6 Years	Secure Disposal
Minutes of Trustee meetings	6 Years	Secure Disposal
Reports presented to the Board of Trustee	6 Years	Secure Disposal
Instruments of Government including Articles of Association	PERMANENT	N/A
Trusts and Endowments managed by the Board of Trustees	PERMANENT	N/A
Action plans created and administered by the Board of Trustees	Life of the action plan + 3 years	Secure Disposal
Policy documents created and administered by the Board of Trustees	Life of the policy + 3 years	Secure Disposal
Records relating to complaints dealt with by the Board of Trustees	Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	Secure Disposal
Annual Reports created under the requirements of the Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002	10 years	Secure Disposal
Proposals concerning the change of status of a maintained academy including Specialist Status Academies	3 years	Secure Disposal



## 5. Management of the Academy

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

<b>Local Governing Body</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Agendas for Governing Body meetings	6 Years	Secure Disposal
Minutes of Governing Body meetings	6 Years	Secure Disposal
Reports presented to the Governing Body	6 Years	Secure Disposal
Meeting papers relating to the annual parents' meeting held under section 33 of the Education Act 2002	6 years	Secure Disposal
Instruments of Government including Articles of Association	PERMANENT	N/A
Trusts and Endowments managed by the Governing Body	PERMANENT	N/A
Action plans created and administered by the Governing Body	Life of the action plan + 3 years	Secure Disposal
Policy documents created and administered by the Governing Body	Life of the policy + 3 years	Secure Disposal
Records relating to complaints dealt with by the Governing Body	Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	Secure Disposal
Annual Reports created under the requirements of the Education (Governor's Annual Reports)(England) (Amendment) Regulations 2002	Date of report + 10 years	Secure Disposal
Proposals concerning the change of status of a maintained academy including Specialist Status Academies and schools	Date proposal accepted or declined + 3 years	Secure Disposal

<b>Head Teacher and Senior Leadership Team</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Minutes of Senior leadership Team meetings, if taken	Date of the meeting + 3 years then review	Secure Disposal
Formal Records, reports or correspondence created by Senior Leaders	Current academic year + 6 years then review	Secure Disposal
Academy Development and Self Evaluation Plans	Life of the plan + 3 years	Secure Disposal
Records relating to complaints dealt with by the Head Teacher or senior leadership team	Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	Secure Disposal

<b>Admissions Process</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
All records relating to the creation and implementation of the Academy Admissions' Policy	Life of the policy + 3 years then review	Secure Disposal
Admissions – if the admission is successful	Date of admission + 1 year	Secure Disposal
Admissions – if the appeal is unsuccessful	Resolution of case + 1 year	Secure Disposal

Register of Admissions	Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made.	Academies may wish to consider keeping the admission register permanently as often academies receive enquiries from past pupils to confirm the dates, they attended the academy.
Admissions – Secondary Academies – Casual	Current year + 1 year	Secure Disposal
Proofs of address supplied by parents as part of the admissions process	Current year + 1 year	Secure Disposal
Supplementary Information form including additional information such as religion, medical conditions etc.	This information should be added to the pupil file	N/A
For successful admissions	This information should be added to the pupil file	Secure Disposal
For unsuccessful admissions	Until appeals process completed	Secure Disposal

<b>Operational Administration</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Records relating to the creation and publication of the academy brochure or prospectus	Current year + 3 years	STANDARD DISPOSAL
Newsletters and other items with a short operational use	Current year + 1 year	STANDARD DISPOSAL
Visitors' Books and Signing in Sheets	Current year + 6 years then REVIEW	Secure Disposal
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Current year + 6 years then REVIEW	Secure Disposal

<b>GDPR Management</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Subject Access Requests	2 years	Secure Disposal
Data Breach records	2 years	Secure Disposal
Data Protection Impact Assessments	2 years	Secure Disposal
Freedom of Information Requests	2 years	Secure Disposal

## 6. Human Resources

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

<b>Recruitment</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
All records leading up to the appointment of a new headteacher	Date of appointment + 6 years	Secure Disposal
All records leading up to the appointment of a new member of staff – unsuccessful candidates	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	All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	Secure Disposal
Pre-employment vetting information – DBS Checks	The academy does not have to keep copies of DBS certificates. If the academy does so the copy must NOT be retained for more than 6 months. DBS details must be entered onto the Single Central Record upon receipt	Secure Disposal
Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	Where possible these should be checked, and a note kept of what was seen and what has been checked. If it is felt necessary to keep copy documentation, then this should be placed on the member of staff’s personal file	Secure Disposal
Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	Where possible these documents should be added to the Staff Personal File [see below], but if they are kept separately then the Home Office requires that the documents are kept for termination of Employment plus not less than two years	Secure Disposal

<b>Operational Staff Management</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Staff Personal File	Termination of Employment + 6 years	Secure Disposal
Staff Pension, Pay History, and Termination Reasons	From DOB + 100 years	Secure Disposal
Timesheets	Current year + 6 years	Secure Disposal
Annual appraisal/ assessment records including lesson observations	Current year + 5 years	Secure Disposal
Staff absence records	Current year + 6 years	Secure Disposal

<b>Management of Disciplinary and Grievance Processes</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Allegation of a child protection nature against a member of staff including where the allegation is unfounded <sup>5</sup>	Until the person’s normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned	Secure Disposal
Disciplinary Proceedings	Termination of Employment + 6 years	Secure Disposal
Grievance Process	Date of Last Action + 6 years	Secure Disposal

<b>Health and Safety</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Health and Safety Policy Statements	Life of policy + 3 years	Secure Disposal
Health and Safety Risk Assessments	Life of risk assessment + 12 years	Secure Disposal
Records relating to accident/ injury at work	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	Secure Disposal

Accident Reporting	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	Secure Disposal
Adults	Date of the incident + 6 years	Secure Disposal
Children	DOB of the child + 25 years	Secure Disposal
Control of Substances Hazardous to Health (COSHH)	Current year + 40 years	Secure Disposal
Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	Last action + 40 years	Secure Disposal
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	Last action + 50 years	Secure Disposal
Fire Precautions log books which may be held by the Facilities Management Company	Current year + 6 years	Secure Disposal
Covid 19 Risk Assessments	Retain paperwork but not individual records	Secure Disposal

<b>Payroll and Pensions</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Maternity pay records	Current year + 3 years	Secure Disposal
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Current year + 6 years	Secure Disposal

## 7. Financial Management of the Academy

This section deals with all aspects of the financial management of the Trust and academies including the administration of academy meals.

<b>Risk Management and Insurance</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Employer's Liability Insurance Certificate	Closure of the academy + 40 years	Secure Disposal

<b>Asset Management</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Inventories of furniture and equipment	Current year + 6 years	Secure Disposal
Burglary, theft and vandalism report forms	Current year + 6 years	Secure Disposal

<b>Accounts and Statements including Budget Management</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Annual Accounts	Current year + 6 years	STANDARD DISPOSAL
Loans and grants managed by the academy	Date of last payment on the loan + 12 years then REVIEW	Secure Disposal
Student Grant applications	Current year + 3 years	Secure Disposal
All records relating to the creation and management of budgets including the Annual Budget statement and background papers	Life of the budget + 3 years	Secure Disposal
Invoices, receipts, order books and requisitions, delivery notices	Current financial year + 6 years	Secure Disposal
Records relating to the collection and banking of monies	Current financial year + 6 years	Secure Disposal
Records relating to the identification and collection of debt	Current financial year + 6 years	Secure Disposal

<b>Contract Management</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
All records relating to the management of contracts under seal	Last payment on the contract + 12 years	Secure Disposal
All records relating to the management of contracts under signature	Last payment on the contract + 6 years	Secure Disposal
Records relating to the monitoring of contracts	Current year + 2 years	Secure Disposal

<b>Academy Fund</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
School Fund - Cheque books	Current year + 6 years	Secure Disposal
School Fund - Paying in books	Current year + 6 years	Secure Disposal
School Fund – Ledger	Current year + 6 years	Secure Disposal
School Fund – Invoices	Current year + 6 years	Secure Disposal
School Fund – Receipts	Current year + 6 years	Secure Disposal
School Fund - Bank statements	Current year + 6 years	Secure Disposal
School Fund – Journey Books	Current year + 6 years	Secure Disposal

<b>School Meals</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Free School Meals Registers	Current year + 6 years	Secure Disposal
School Meals Registers	Current year + 3 years	Secure Disposal
School Meals Summary Sheets	Current year + 3 years	Secure Disposal

## 8. Property Management

This section covers the management of buildings and property.

<b>Property Management</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Title deeds of properties belonging to the academy	PERMANENT These should follow the property unless the property has been registered with the Land Registry	N/A
Plans of property belong to the academy	These should be retained whilst the building belongs to the academy and should be passed onto any new owners if the building is leased or sold.	N/A
Leases of property leased by or to the academy	Expiry of lease + 6 years	Secure Disposal
Records relating to the letting of academy premises	Current financial year + 6 years	Secure Disposal

<b>Maintenance</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
All records relating to the maintenance of the academy carried out by contractors	Current year + 6 years	Secure Disposal
All records relating to the maintenance of the academy carried out by academy employees including maintenance logbooks	Current year + 6 years	Secure Disposal

## 9. Pupil Management

This section includes all records which are created during the time a pupil spends at the academy. For information about accident reporting see under Health and Safety above.

<b>Pupil's Educational Record</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005 Primary  Sometimes referred to as Pupil File	Retain whilst the child remains at the primary academy	The file should follow the pupil when he/she leaves the primary academy. <sup>1</sup> This will include: (i) to another primary academy (ii) to a secondary academy (iii) to a pupil referral unit (iv) If the pupil dies whilst at primary academy the file should be returned to the Local Authority to be retained for the statutory retention period. If the pupil transfers to an independent academy, 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. 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
Examination Results	This information should be added to the pupil file	
Child Protection information held on pupil file	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
Child protection information held in separate files	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal
Pupil medical records	DOB of the child + 25 years	Secure Disposal
Pupil exclusions / suspensions	This information should be added to the pupil file	

<b>Attendance</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Attendance Registers	Retain whilst the child remains at the primary academy plus 2 years	Secure Disposal
Correspondence relating to authorized absence	Retain whilst the child remains at the primary academy plus 2 years	Secure Disposal

<b>Special Educational Needs</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>

Special Educational Needs files, reviews and Individual Education Plans	Date of Birth of the pupil + 25 years	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.
Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	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



## 10. Curriculum Management

This section contains retention periods connected with the delivery of curriculum.

<b>Statistics and Management Information</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Curriculum returns to DfE including School Census Returns	Current year + 3 years	Secure Disposal
Examination Results (Academies Copy)	Current year + 6 years	Secure Disposal
SATs records and 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 academy may wish to keep a composite record of all the whole year SATs results. These could be kept for current year + 6 years to allow suitable comparison	Secure Disposal
SATs Examination Papers	The examination papers should be kept until any appeals/validation process is complete	Secure Disposal
Published Admission Number (PAN) Reports	Current year + 6 years	Secure Disposal
Value Added and Contextual Data	Current year + 6 years	Secure Disposal

<b>Implementation of Curriculum</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Schemes of Work	From end of use + 1 year Samples can be retained where personally identifiable information is removed	Review these records at the end of each year and allocate a further retention period or Secure Disposal
Class Record/Mark Books e.g. reading records	From end of use + 1 year Samples can be retained where personally identifiable information is removed	
Record homework set	From end of use + 1 year Samples can be retained where personally identifiable information is removed	
Pupils' Work	Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the academy's policy then: From end of use + 1 year Samples can be retained where personally identifiable information is removed e.g. for moderation of inspection readiness	Secure Disposal of identifiable pages

## 11. Extra Curriculum Management

This section contains retention periods connected with extracurricular activities.

<b>Educational Visits outside the Classroom</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Records created by academies to obtain approval to run an Educational Visit outside the Classroom. E.G. LGB, CEO and Evolve	Date of visit + 14 years	Secure Disposal
Parental consent forms for academy trips where there has been no major incident	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 academies do not have the storage capacity to retain every single consent form issued by the academy for this period of time.
Parental permission slips for academy trips – where there has been a major incident	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

<b>Walking Bus</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Walking Bus Registers	Date of register + 3 years This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report and kept for the period of time required for accident reporting	Secure Disposal [If these records are retained electronically any backup copies should be destroyed at the same time]

<b>Family Liaison Officers and Home School Liaison Assistants</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Day Books	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal
Reports for outside agencies - where the report has been included on the case file created by the outside agency	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal
Referral forms	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal
Contact data sheets	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal
Contact database entries	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal

Group Registers	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal
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## 12. Central Government and Local Authority

This section contains retention periods for data related to central government and local authorities.

<b>Local Authority</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Secondary Transfer Sheets (Primary)	Current year + 2 years	Secure Disposal
Attendance Returns	Current year + 1 year	Secure Disposal
School Census Returns	Current year + 5 years	Secure Disposal
Circulars and other information sent from the Local Authority	Operational use	Secure Disposal

<b>Central Government</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
OFSTED reports and papers	Life of the report then REVIEW	Secure Disposal
Returns made to central government	Current year + 6 years	Secure Disposal
Circulars and other information sent from central government	Operational use	Secure Disposal

### 13. Email Records

This section contains retention periods of electronic mail of both pupils and staff.

<b>Pupil and Staff</b>		
<b>Data Item</b>	<b>Retention Period</b>	<b>Final Action</b>
Pupil emails – not containing any information included elsewhere in this policy	24 months	Secure Disposal
Staff emails – not containing any information included elsewhere in this policy	24 months	Secure Disposal