



CRADLEY CE PRIMARY SCHOOL

FREEDOM OF INFORMATION POLICY

Vision Statement: Enriching Lives

Policy written by: Mr H. E. Wagstaffe

<u>Dates</u>				
Written				
Reviewed	May 2016	Spring 19	Spring 22	
Amended				
Next Review	May 2019	Spring 22	Spring 24	

CRADLEY C OF E VA PRIMARY SCHOOL

THE SCHOOL'S PUBLICATION SCHEME ON INFORMATION AVAILABLE UNDER THE FREEDOM OF INFORMATION ACT 2000

1, The governing body is responsible for maintenance of this scheme.

2, Introduction: what a publication scheme is and why it has been developed

2.1, One of the aims of the Freedom of Information Act 2000 (which is referred to as FOIA in the rest of this document) is that public authorities, including all maintained schools, should be clear and proactive about the information they will make public.

2.2, To do this we must produce a publication scheme setting out:

- The classes of information which we publish or intend to publish;
- The manner in which the information will be published; and
- Whether the information is available free of charge or on payment.

2.3, The scheme covers information already published and information which is to be published in the future. All information in our publication scheme is available in paper form.

2.4, Some information which we hold may not be made public, for example personal information.

2.5, This publication scheme conforms to the model scheme for schools approved by the Information Commissioner.

3, Aims and Objectives

3.1, The school aims to:

- Create a stable, well-disciplined environment where the children are encouraged to live in harmony with, and to develop respect for, others and their surroundings
- Provide for all abilities and make every effort to extend each child to his or her fullest potential
- Help children to produce work of real quality and to allow them to take a pride in their efforts and achievements
- Encourage all children to acquire independence in all their activities so that they play an increasing part in self-discipline and self-organisation

and this publication scheme is a means of showing how we are pursuing these aims.

3.2, The school's motto is Enriching Lives

4, Categories of information published

- 4.1, The publication scheme guides you to information which we currently publish (or have recently published) or which we will publish in the future. This is split into categories of information known as ‘classes’. These are contained in section 6 of this scheme.
- 4.2, The classes of information that we undertake to make available are organised into four broad topic areas:
- School Prospectus – information published in the school prospectus.
 - Governors’ Documents – information published in the Governors’ Annual Report and in other governing body documents.
 - Pupils & Curriculum – information about policies that relate to pupils and the school curriculum.
 - School Policies and other information related to the school - information about policies that relate to the school in general.

5, How to request information

- 5.1, If you require a paper version of any of the documents within the scheme, please contact the school by telephone, email, fax or letter. Contact details are set out below.

Tel: 01886 880 315

Email: admin@cradley.hereford.sch.uk

Fax: 01886 880 913

Contact Address: Cradley, Malvern, Worcs. WR13 5NG

- 5.2, To help us process your request quickly, please clearly mark any correspondence “PUBLICATION SCHEME REQUEST” (in CAPITALS please)
- 5.3, If the information you are looking for is not available via the scheme, you can still contact the school to ask if we have it.

6, Paying for information

- 6.1, Single copies of information covered by this publication are provided free unless stated otherwise in section 6. If your request means that we have to do a lot of photocopying or printing, or pay a large postage charge, or is for a priced item such as some printed publications or videos we will let you know the cost before fulfilling your request. If there are no such special circumstances but there is a charge, this will be indicated by a £ sign in the description box.

7, Classes of Information Currently Published

School Prospectus – this section sets out information published in the school prospectus.

Class	Description
School Prospectus	<p>The statutory contents of the school prospectus are as follows, (other items may be included in the prospectus at the school’s discretion):</p> <ul style="list-style-type: none"> • the name, address and telephone number of the school, and the type of school • the names of the head teacher and chair of governors • information on the school policy on admissions • a statement of the school's ethos and values • details of any affiliations with a particular religion or religious denomination, the religious education provided, parents' right to withdraw their child from religious education and collective worship and the alternative provision for those pupils • information about the school's policy on providing for pupils with special educational needs • number of pupils on roll and rates of pupils’ authorised and unauthorised absences • National Curriculum assessment results for appropriate Key Stages, with national summary figures • the arrangements for visits to the school by prospective parents

Information relating to the governing body.

Instrument of Government	<ul style="list-style-type: none"> • The name of the school • The category of the school • The name of the governing body • The manner in which the governing body is constituted • The term of office of each category of governor is 4 years • The name of any body entitled to appoint any category of governor • Details of any trust • If the school has a religious character, a description of the ethos • The date the instrument takes effect
Minutes ¹ of meeting of the governing body and its committees	Agreed minutes of meetings of the governing body and its committees [current and last full academic school year]

Pupils & Curriculum Policies - This section gives access to information about policies that relate to pupils and the school curriculum.

Class	Description
Curriculum Policy	Statement on following the policy for the secular curriculum subjects and religious education and schemes of work and syllabuses currently used by the school
SRE Policy	Statement of policy with regard to sex and relationship education
Special Education Needs Policy	Information about the school's policy on providing for pupils with special educational needs

¹ Some information may be confidential or otherwise exempt from the publication by law – we cannot therefore publish this

Accessibility Plans	Plan for increasing participation of disabled pupils in the school's curriculum, improving the accessibility of the physical environment and improving delivery of information to disabled pupils.
Equality Statement	Statement of policy for promoting equality.
Collective Worship	Statement of arrangements for the required daily act of collective worship
Safeguarding Policy	Statement of policy for safeguarding and promoting welfare of pupils at the school.
Pupil Behaviour	Statement of general principles on behaviour and discipline and of measures taken by the head teacher to prevent bullying.

School Policies and other information related to the school - This section gives access to information about policies that relate to the school in general.

Class	Description
Published reports of Ofsted referring expressly to the school	Published report of the last inspection of the school and the summary of the report and where appropriate inspection reports of religious education in those schools designated as having a religious character
Charging and Remissions Policies	A statement of the school's policy with respect to charges and remissions for any optional extra or board and lodging for which charges are permitted, for example school publications, music tuition, trips
School session times and term dates	Details of school session and dates of school terms and holidays
Health and Safety Policy and risk assessment	Statement of general policy with respect to health and safety at work of employees (and others) and the organisation and arrangements for carrying out the policy
Complaints procedure	Statement of procedures for dealing with complaints
Performance Management of Staff	Statement of procedures adopted by the governing body relating to the performance management of staff and the annual report of the head teacher on the effectiveness of appraisal procedures
Staff Conduct, Discipline and Grievance	Statement of procedure for regulating conduct and discipline of school staff and procedures by which staff may seek redress for grievance
Curriculum circulars and statutory instruments	Any statutory instruments, departmental circulars and administrative memoranda sent by the Department of Education and Skills to the head teacher or governing body relating to the curriculum
Annex A - Other documents	Annex A provides a list of other documents that are held by the school and are available on request

Feedback and Complaints

We welcome any comments or suggestions you may have about the scheme. If you want to make any comments about this publication scheme or if you require further assistance or wish to make a complaint then initially this should be addressed to the Headteacher at the school

If you are not satisfied with the assistance that you get or if we have not been able to resolve your complaint and you feel that a formal complaint needs to be made then this should be addressed to the Information Commissioner's Office. This is the organisation that ensures compliance with the Freedom of Information Act 2000 and that deals with formal complaints. They can be contacted at:

Information Commissioner, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF

or

Enquiry/Information Line: 01625 545 700

E Mail: publications@ic-foi.demon.co.uk.

Website : www.informationcommissioner.gov.uk

The purpose of the retention schedule

Under the Freedom of Information Act 2000, schools are required to maintain a retention schedule listing the record series which the school creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems.

The retention schedule refers to all information, regardless of the media in which they are stored.

Benefits of a retention schedule

There are a number of benefits which arise from the use of a complete retention schedule:

- Managing records against the retention schedule is deemed to be “normal processing” under the Data Protection Act 1998 and the Freedom of Information Act 2000. Provided members of staff are managing record series using the retention schedule they can not 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.

Maintaining and amending the retention schedule

Where appropriate the retention schedule should be reviewed and amended to include any new record series created and remove any obsolete record series.

What to do with records once they have reached the end of their administrative life

Destruction of records

Where records have been identified for destruction they should be disposed of in an appropriate way. All records containing personal information, or sensitive policy information should be shredded before disposal (if possible). Any other records should be bundled up and disposed of to a waste paper merchant or disposed of in other appropriate ways.

The Freedom of Information Act 2000 requires the school 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 other unique identifier);
- File title (or brief description);
- No of files

- The name of the authorising officer

This could be kept in an Excel spreadsheet or other database format.

Transfer of records to the Archives

Where records have been identified as being worthy of permanent preservation, arrangements should be made to transfer the records to the Archives. A list of the records sent to the archives should be created to include the information above.

[insert contact details here]

Transfer of information to other media

Where lengthy retention periods have been allocated to records, members of staff may wish to consider converting paper records to other media such as microform or digital media. The lifespan of the media and the ability to migrate data where necessary should always be considered.

Useful Contacts

[insert useful contacts here]

Child Protection

The retention and use of records relating to child protection matters concerning pupils, and child protection allegations against staff requires specific guidance in this schedule. This will be subject to update following implementation of the recommendations by Sir Michael Bichard.

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Child Protection files	Yes	Education Act 2002, s175, related guidance “Safeguarding Children in Education”, September 2004	DOB + 25 years ²	SHRED	Child Protection information must be copied and sent under separate cover to new school/college whilst the child is still under 18 (i.e. the information does not need to be sent to a university for example) Where a child is removed from roll to be educated at home, the file should be copied to the Local Education Authority.
Allegation of a child protection nature against a member of staff, including where the allegation is unfounded	Yes	Employment Practices Code: Supplementary Guidance 2.13.1 (Records of Disciplinary and Grievance) Education Act 2002 guidance “Dealing with Allegations of Abuse against Teachers and Other Staff” November 2005	Until the person’s normal retirement age, or 10 years from the date of the allegation if that’s longer	SHRED	Employment Practices Code: Supplementary Guidance 2.13.1 (Records of Disciplinary and Grievance) “Records of allegations about workers who have been investigated and found to be without substance should not normally be retained once an investigation has been completed. There are some exceptions to this where for its own protection the employer has to keep a limited record that an allegation was received and investigated, for example, where the allegation relates to abuse and the worker is employed to work with children or other vulnerable individuals”. Summary record to be retained on confidential personnel file, and a copy given to the person concerned

² This amendment has been made in consultation with the Safeguarding Children Group.

Governors

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Minutes					
<ul style="list-style-type: none"> Principal set (signed) 	No		Permanent	Retain in school for 6 years from date of meeting	Transfer to Archives
<ul style="list-style-type: none"> Inspection copies 	No		Date of meeting + 3 years	DESTROY [If these minutes contain any sensitive personal information they should be shredded]	
Agendas	No		Date of meeting	DESTROY	
Reports	No		Date of report + 6 years	Retain in school for 6 years from date of meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Annual Parents' meeting papers	No		Date of meeting + 6 years	Retain in school for 6 years from date of meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Instruments of Government	No		Permanent	Retain in school whilst school is open	Transfer to Archives when the school has closed
Trusts and Endowments	No		Permanent	Retain in school whilst operationally required	Transfer to Archives
Action Plans	No		Date of action plan + 3 years	DESTROY	It may be appropriate to offer to the Archives for a sample to be taken if the school has been through a difficult period
Policy documents	No		Expiry of policy	Retain in school whilst policy is operational (this includes if the expired policy is part of a past decision making process)	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

<u>Governors</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Complaints files	Yes		Date of resolution of complaint + 6 years	Retain in school for the first six years Review for further retention in the case of contentious disputes Destroy routine complaints Complaints alleging possible harm to a young person by a member of staff are covered in 6.1 above.	
Annual Reports required by the Department for Education and Skills	No	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002.SI 2002 No 1171	Date of report + 10 years		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Proposals for schools to become, or be established as Specialist Status schools	No		Current year + 3 years		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

Management

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Log Books [Books where the Head-teacher or another member of staff keeps of record of what happens in the school, this may include details of events, photographs and other information]	Yes ³		Date of last entry in the book + 6 years	Retain in the school for 6 years from the date of the last entry.	Transfer to the Archives
Minutes of the Senior Management Team and other internal administrative bodies	Yes ¹		Date of meeting + 5 years	Retain in the school for 5 years from meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Reports made by the head teacher or the management team	Yes ¹		Date of report + 3 years	Retain in the school for 3 years from meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities (except child protection records which are dealt with in section 6.1 above).	Yes ¹		Closure of file + 6 years	DESTROY If these records contain sensitive information they should be shredded	
Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	No		Date of correspondence + 3 years	DESTROY If these records contain sensitive information they should be shredded	
Professional development plans	Yes		Closure + 6 years	SHRED	
School development plans	No		Closure + 6 years	Review	Offer to the Archives

³ From January 1st 2005 subject access is permitted into unstructured filing systems and log books and other records created within the school containing details about the activities of individual pupils and members of staff will become subject to the Data Protection Act 1998.

<u>Pupils</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Admission Registers	Yes		Date of last entry in the book (or file) + 6 years	Retain in the school for 6 years from the date of the last entry.	Transfer to the Archives
Attendance registers	Yes		Date of register + 3 years	DESTROY [If these records are retained electronically any back up copies should be destroyed at the same time]	
Pupil record cards	Yes				
<ul style="list-style-type: none"> • <i>Primary</i> 			Retain for the time which the pupil remains at the primary school	Transfer to the secondary school (or other primary school) when the child leaves the school. In the case of exclusion it may be appropriate to transfer the record to the Behaviour Service	
<ul style="list-style-type: none"> • <i>Secondary</i> 			DOB of the pupil + 25 years ⁴	SHRED	
Pupil files	Yes				
<ul style="list-style-type: none"> • <i>Primary</i> 			Retain for the time which the pupil remains at the primary school	Transfer to the secondary school (or other primary school) when the child leaves the school. In the case of exclusion it may be appropriate to transfer the record to the Behaviour Service	
<ul style="list-style-type: none"> • <i>Secondary</i> 			DOB of the pupil + 25 years ⁵	SHRED	

⁴ In the case of exclusion it may be appropriate to transfer the record to the Behaviour Service

⁵ As above

<u>Pupils</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Special Educational Needs files, reviews and Individual Education Plans	Yes		DOB of the pupil + 25 year ⁶	SHRED	
Letters authorising absence	No		Date of absence + 2 years	SHRED	
Absence books			Current year + 6 years	SHRED	
Examination results	Yes				
• <i>Public</i>	No		Year of examinations + 6 years	DESTROY	Any certificates left unclaimed should be returned to the appropriate Examination Board
• <i>Internal examination results</i>	Yes		Current year + 5 years ⁷	DESTROY	
Any other records created in the course of contact with pupils	Yes/No		Current year + 3 years	Review at the end of 3 years and either allocate a further retention period or DESTROY	
Statement maintained under The Education Act 1996 - Section 324	Yes	Special Educational Needs and Disability Act 2001 Section 1	DOB + 30 years	DESTROY unless legal action is pending	
Proposed statement or amended statement	Yes	Special Educational Needs and Disability Act 2001 Section 1	DOB + 30 years	DESTROY unless legal action is pending	
Advice and information to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Closure + 12 years	DESTROY unless legal action is pending	

⁶ As above

⁷ If these records are retained on the pupil file or in their National Record of Achievement they need only be kept for as long as operationally necessary.

<u>Pupils</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Closure + 12 years	DESTROY unless legal action is pending	
Children SEN Files	Yes		Closure + 35 years	DESTROY unless legal action is pending	

Curriculum					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Curriculum development	No		Current year + 6 years	DESTROY	
Curriculum returns	No		Current year + 3 years	DESTROY	
School syllabus	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
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 new retention period or DESTROY	
Timetable	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Class record books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	

Curriculum					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Mark Books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Record of homework set	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Pupils' work	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Examination results	Yes		Current year + 6 years	DESTROY [These records should be shredded]	
SATS records	Yes		Current year + 6 years	DESTROY [These records should be shredded]	
PANDA reports	Yes		Current year + 6 years	DESTROY [These records should be shredded]	
Value added records	Yes		Current year + 6 years	DESTROY [These records should be shredded]	

<u>Personnel</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Timesheets, sick pay	Yes	Financial Regulations	Current year + 6 years	SHRED	
Staff Personal files	Yes		Termination + 7 years	SHRED	

Personnel

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Interview notes and recruitment records	Yes		Date of interview + 6 months	SHRED	
Pre-employment vetting information (including unsuccessful CRB checks)	No	CRB guidelines	Date of check + 6 months	SHRED [by the designates member of staff]	This information should be placed on the personnel file if the applicant is successful and managed according to the guidelines
Disciplinary proceedings for all matters except those relating to child protection issues (see 6.1 above):	Yes				
<ul style="list-style-type: none"> <i>Oral warning</i> 			Date of warning + 6 months	SHRED If this is placed on a personal file, it must be weeded from the file.	
<ul style="list-style-type: none"> <i>written warning – level one</i> 			Date of warning + 6 months	SHRED If this is placed on a personal file, it must be weeded from the file.	
<ul style="list-style-type: none"> <i>written warning – level two</i> 			Date of warning + 12 months	SHRED If this is placed on a personal file, it must be weeded from the file.	
<ul style="list-style-type: none"> <i>final warning</i> 			Date of warning + 18 months	SHRED If this is placed on a personal file, it must be weeded from the file.	
<ul style="list-style-type: none"> <i>case not found</i> (except child protection allegations see section 6.1 above) 			DESTROY immediately at the conclusion of the case		

Personnel

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Records relating to accident/injury at work	Yes		Date of incident + 12 years	Review at the end of this period. In the case of serious accidents a further retention period will need to be applied	
Annual appraisal/assessment records	No		Current year + 5 years	SHRED	
Salary cards	Yes		Last date of employment + 6 years	The information should be transferred to the superannuation department at the appropriate time who will maintain the master record	SHRED
Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567)	Current year, +3yrs	SHRED	
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Last payment + 6 years	SHRED	

Health and Safety

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
-------------------------------	-------------------------	-----------------------------	---------------------------------------	---	--

Health and Safety					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Accessibility Plans		Disability Discrimination Act	Current year + 6 years	DESTROY	
Accident Reporting		Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980			
• <i>Adults – Accident Book</i>	Yes		Last entry in the accident book + 3 years	SHRED	
• <i>Adults – Internal Reports</i>	Yes		Current year + 3 years	SHRED	
• <i>Children</i>	Yes		DOB + 25 years ⁸	SHRED	
COSHH			Current year + 10 years	Review [where appropriate an additional retention period may be allocated]	
Incident reports	Yes		Current year + 20 years	SHRED	
Policy Statements			Date of expiry + 1 year	DESTROY	
Risk Assessments			Date assessment superseded + 3 years	DESTROY	

⁸ A child may make a claim for negligence for 7 years from their 18th birthday. To ensure that all records are kept until the pupil reaches the age of 25 this retention period has been applied.

Health and Safety

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Process of monitoring of areas where employees and persons are likely to have come in contact with asbestos			Last action + 40 years	DESTROY	
Process of monitoring of areas where employees and persons are likely to have come in contact with radiation			Last action + 50 years	DESTROY	
Fire Precautions log books			Current year + 6 years	DESTROY	

Administrative

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Employer's Liability certificate			Permanent whilst the school is open	Retain for 40 years after school has closed	
Inventories of equipment and furniture			Disposal of last item + 6 years or date superseded + 6 years	DESTROY	
General file series			Current year + 5 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
School brochure/prospectus			Current year + 3 years		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Circulars (staff/parents/pupils)			Current year + 1 year	DESTROY	
Newsletters, ephemera			Current year + 1 year	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Visitors' book			Current year + 2 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
PTA/Old Pupils' Associations			Current year + 6 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

<u>Finance</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Annual Accounts		Financial Regulations	Current year + 6 years		Offer to the Archives
Loans and grants		Financial Regulations	Date of last payment on loan + 12 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Contracts					
• under seal			Contract completion date + 12 years	SHRED	
• under signature			Contract completion date + 6 years	SHRED	
• monitoring records			Current year + 2 years	SHRED	
Copy orders			Current year + 2 years	SHRED	
Budget reports, budget monitoring etc			Current year + 3 years	SHRED	
Invoice, receipts and other records covered by the Financial Regulations		Financial Regulations	Current year + 6 years	SHRED	
Annual Budget and background papers			Current year + 6 years	SHRED	
Order books and requisitions			Current year + 6 years	SHRED	
Delivery Documentation			Current year + 6 years	SHRED	
Debtors' Records		Limitation Act 1980	Current year + 6 years	SHRED	
School Fund – Cheque books			Current year + 3 years	SHRED	
School Fund – Paying in books			Current year + 6 years	SHRED	
School Fund – Ledger			Current year + 6 years	SHRED	
School Fund – Invoices			Current year + 6 years	SHRED	
School Fund – Receipts			Current year + 6 years	SHRED	
School Fund – Bank statements			Current year + 6 years	SHRED	
School Fund – School Journey books			Current year + 6 years	SHRED	

<u>Finance</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Applications for free school meals, travel, uniforms etc			Whilst child at school	SHRED	
Student grant applications			Current year + 3 years	SHRED	
Free school meals registers	Yes	Financial Regulations	Current year + 6 years	SHRED	
Petty cash books		Financial Regulations	Current year + 6 years	SHRED	

<u>Property</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Title Deeds			Permanent	These should follow the property	Offer to Archives
Plans			Permanent	Retain until superseded then offer to archives before destruction	Offer to Archives
Maintenance and contractors		Financial Regulations	Current year + 6 years	DESTROY	
Leases			Expiry of lease + 6 years	DESTROY	
Lettings			Current year + 3 years	DESTROY	
Burglary, theft and vandalism report forms			Current year + 6 years	SHRED	
Maintenance log books			Last entry + 10 years	DESTROY	
Contractors' Reports			Current year + 6 years	DESTROY	

<u>LEA</u>					

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Secondary transfer sheets (Primary)	Yes		Current year + 2 years	SHRED	
Attendance returns	Yes		Current year + 1 year	DESTROY	
Circulars from LEA			Whilst operationally required	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

<u>DfES</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
HMI reports			These do not need to be kept any longer		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
OFSTED reports and papers			Replace former report with any new inspection report	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Returns			Current year + 6 years	DESTROY	
Circulars from DfES			Whilst operationally required	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

<u>Connexions</u>					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Service level agreements			Until superseded	SHRED	
Work Experience agreement			DOB of child + 18 years	SHRED	

School Meals					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Dinner Register			Current year + 3 years	SHRED	
School Meals Summary Sheets			Current year + 3 years	SHRED	