

Whitefield Academy Records Retention Schedule

Introduction

This retention schedule describes the time periods for which records should be retained by the Academy in order to comply with operational and legal requirements, including data protection legislation. The retention periods given in this document are taken largely from the guidelines from the Information and Record Management Society. Please note that the default action to be taken at the end of the retention period is the secure destruction or deletion of the record. Exceptions to this are where the retention period is described as “permanent” (ie the record will never be destroyed), or where “refer to archives” is mandated.

All records created and held by the Academy, both in paper and electronic form, and including data held in databases are subject to retention policies. Where a record contains person identifying information the retention periods stated in this schedule are mandatory requirements and must be followed unless a specific exception has been approved by the Education Data Protection Officer Service.

Entries marked with an * indicate a record that is likely contain person identifying information, this may not be exhaustive. Unstructured information systems Email must not be used for storing Academy records, as all emails will be deleted after a specified period. Emails that constitute a record which needs to retained, including those containing person identifying information, must be stored in an appropriate filing system relevant to their confidentiality or criticality. Shared drives or other unstructured information storage solutions (including cloud based storage) used to store any Academy record should be managed in accordance with this schedule, however where those records contain person identifying information the retention periods must be followed.

Structured systems storing person identifying information

All structured information management systems that store records containing person identifying information must be managed in accordance with this schedule. These systems must have a deletion or archival capability and where appropriate be able to identify a skeleton record (a subset of the original information) for continued retention.. Publications and promotional materials should be kept whilst current, and then 1 copy offered to the Academy Archives for review.

Record Types / Process Content	Functions / Activities	Retention Period	Retention Policy	Retention Period Starts	Lawful Basis for Processing Personal Data
Area FINANCE OFFICE-RECEPTION					
Land Registry Documents	Legal obligation	These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold.	Archive	PERMANENT These should follow the property unless the property has been registered with the Land Registry	legal obligation
Master & Supplementary funding agreement	Transactional	Current year + 6 years	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract
CCTV Recorded Memory	Safeguarding	28 days	Delete	Term after departure	Site security
Purchase Orders	Transactional	Current year + 6 years	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract
Purchase Invoices, delivery notes	Transactional	Current year + 1 year	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract
Bank Statements	Transactional	Current year + 6 years	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract
Payroll Files	Transactional	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Network Payroll Files on U and M drives	Transactional	Current year + 6 years	Delete	Term after departure from Academy	necessary for the performance of a contract
Resource Level Top up Funding	Transactional	Current year + 6 years	Delete	Term after departure from Academy	under performance of a task carried out in the public interest or in the exercise of official authority
Network Resource Level Top up Funding on U and M drives	Transactional	Current year + 6 years	Delete	Term after departure from Academy	necessary for the performance of a contract
Sales Invoices/ remittance advices	Transactional	Current year + 6 years	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract

Petty cash Slips	Transactional	Current year + 6 years	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract
Payroll files/invoices/petty cash slips	Transactional	Current year + 6 years	SECURE DISPOSAL	Transaction date	necessary for the performance of a contract
Pupil Lists	Function of public funded education	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Visitors log book	Record of Academy visitors with appointments	Current year + 2 years	SECURE DISPOSAL	Term after visit to Academy	Safeguarding
Visitors lists	Record of casual Academy visitors	Current year + 3 years	SECURE DISPOSAL	Term after visit to Academy	Safeguarding
Area:- CFO's Office					
Payroll files(Manual/electronic)	Contract pay	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Monthly Monitoring reports	Equalities	Current academic year + 6 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Correspondence files/EFA submissions/VAT Returns	Function of public funded education	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Reports to Directors	Function of public funded education	Date of the report + a minimum of 3 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Trust policies	Function of public funded education	Life of the policy + 3 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Minutes of Directors	Function of public funded education	Date of the meeting + 3 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Memorandum of Association	Function of public funded education	One copy should be retained with the master set. All other copies can be disposed of	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Articles of Association	Function of public funded education	One copy should be retained with the master set. All other copies can be disposed of	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Lease- Joseph Clarke School	Legal obligation	Permanent	Archive	Term after departure from Academy	necessary for the performance of a contract
Area Classrooms – Joseph Clarke School					
Termly Information file	Function of public funded education	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Class Welcome File	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Medical care plans	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupil files containing PCR's / reports etc.	Function of public funded education	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: Admissions					
Pupils Referral Documents	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
SIMS Pupil Database	Function of public funded education	Date of birth of pupil +25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Phoenix Pupil Database	Function of public funded education	Date of birth of pupil +25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: General Office					
Pupils Files	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
SIMS Pupil Database	Function of public funded education	Student's 25th birthday	Delete	Term after departure from Academy	Performance of a task carried out in the public interest for

					the function of public funded education
Phoenix Pupil Database	Function of public funded education	Student's 25th birthday	Delete	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
PCR/APR/PSP Docs	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Safeguarding List	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Spreadsheet containing pupil's info	Function of public funded education	Student's 25th birthday	Delete	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Attendance Registers	Function of public funded education	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: PA Office					
Advisory Council Members/Director details	Function of public funded education	Retained for term as Council Member + 2 years	SECURE DISPOSAL	Term after departure from Academy	
Advisory Council Members/Directors Address label	Function of public funded education	Retained for term as Council Member + 2 years	SECURE DISPOSAL	Term after departure from Academy	

NPQML contact details	Function of public funded education	Retained for term as Council Member + 2 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupils Absence Letters	Function of public funded education	Current academic year + 2 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: Past Pupil Files					
Leavers Files	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from school	Performance of a task carried out in the public interest for the function of public funded education
Area: Confidential Waste Bags					
Bags containing confidential documents	contractual obligation	Paper disposal - as records are no longer required	SECURE DISPOSAL	Upon collection	necessary for the performance of a contract
Area ___ Home Liaison Service					
Initial internal referral	Function of public funded education	DOB of child + 25 years or Date of referral	SECURE DISPOSAL	Term after departure from Academy	Vital interests/ related to Safeguarding Children in Education September 2004
Initial home visit report	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Vital interests/ related to Safeguarding Children in Education September 2005
Record of home visit session	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Vital interests/ related to Safeguarding Children in Education September 2006
Area: Website & Media					
Staff login information	Function of public funded education	Termination of employment, student leaving the school	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract

Photographs of students and staff	Function of public funded education	Termination of employment, student leaving the school	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area ___ HR					
Personal file	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Senior Leader personal files	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Appraisal documents (all staff)	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
SLT Appraisals	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Disciplinary File	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Parental leave application	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Sickness information	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Recruitment process Application forms Shortlisting + interview notes for unsuccessful candidates	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Single central register	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Sims – HR database	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Area ___ Library					

Foundation Degree Students and staff records.	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Safeguarding					
Reports from staff	contractual obligation	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Reports from staff via safeguarding email	contractual obligation	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Reports from staff – via Safeguard	contractual obligation	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Letters from professionals	contractual obligation	Termination of employment, student leaving the school	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Emails from professionals	contractual obligation	Whilst child is attending school and then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Reports of investigations	contractual obligation	Whilst child is attending school and then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Accident process					

Accident forms	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Accident form summary records	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: Joseph Clarke School Accident Forms					
Just handed in accident forms	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Accident forms – being processed	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
One copy of completed accident forms - pupil	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
One copy of completed accident forms – staff	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Copies of accident forms	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Area Complaints from staff and parents					
Printed copies of complaints and responses	Function of public funded education	Retain for the time which the pupil remains at Academy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Electronic copies of complaints and responses	Function of public funded education	Retain for the time which the pupil remains at Academy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Nursing					
Child health records		Retain for the time which the pupil remains at Academy and then transfer	SECURE DISPOSAL	Term after departure from Academy	
				Term after departure from Academy	
Area: Post-16				Term after departure from Academy	
Pupil information – PCR / APR reports / EHC plans and related information	Function of public funded education	DOB of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Laptop – presentations	Function of public funded education	Retain for the time needed for presentation	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Contact details of past and current Project SEARCH group	Function of public funded education	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Photos and videos	Function of public funded education	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Email server	Function of public funded education	Termination of employment	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Planning and other paperwork related to curriculum	Function of public funded education	Current year + 3 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Curriculum paperwork and policies document	Function of public funded education	Current year + 3 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Safeguarding documentation	Function of public funded education	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Project SEARCH Interns interview details	Function of public funded education	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Intern personal information and job applications- Paper and online	Function of public funded education	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Photographs	Function of public funded education	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Explicit consent
Project SEARCH Documents	Function of public funded education	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Area: Site Service Managers Office					
Accident/Riddor Reporting Forms	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Authorisation Forms. Copy of Downloaded CCTV Footage Images	Legal obligation	Date of birth of pupil +25 years	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Health and Safety Procedures Policies Reports	Legal obligation	Life of policy + 3 years	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Contractors Specifications Work Sheets Details Certificates	Legal obligation	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Buildings Operational Manuals	Legal obligation	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.	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Area __Margaret Brearley, Peter Turner Primary & Niels Chapman Secondary__					
Pupil files	Function of public funded education	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

		Paper: put in confidential waste daily			
Eating and Drinking guidelines (MBS)	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Moving and Handling guidelines (MBS)	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Behaviour - PPSP/Sensory profiles	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Behaviour meeting minutes	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Welcome files -Medical needs -PPSP/Sensory profiles -Photo permissions	Function of public funded education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Medical folder -Care plans for medical emergencies e.g. Epilepsy, anaphylaxis, asthma	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Home teaching reports	Function of public funded education	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 current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Accident forms	Function of public funded education	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Accident forms. Yellow carbon copies	Function of public funded education	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Registers	Function of public funded education	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made.	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Observations	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Monitoring folders	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Curriculum Tracking documents	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
School information file -Class list -Pupil Premium & CLA -Ethnicity -Year group -Resource level -Staff M&H status Staff Dysphagia status	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

-PCR/EHCP schedule -Pupils with Behaviour support -Pupil Dysphagia levels					
Learning journals (MBS)	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
EYFS (PTP & MBS)	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress Files	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
ASDAN evidence folders	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Evidence for learning	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Staffing concerns	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Parental contact (letters)	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Home school books	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Old home school books	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress meeting documents	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
FALPS	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress reports	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress folders of leavers (Y14)	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Medical Therapists Guidelines	Management of medical needs of students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupil Referral Papers	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Absence follow up notes	Function of public funded education	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Teacher/Staff Application forms	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Incident book	Legal obligation	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Exam Papers (NCS)	Legal obligation	This information should be added to the pupil file	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area ___ Family Support Office					
Parent's contact details	Contact details	Retain for the time which the pupil remains at Academy	SECURE DISPOSAL	Term after departure from Academy	Explicit consent
Afterschool club children's names	Contact details	Current academic year then dispose	SECURE DISPOSAL	Term after departure from Academy	Explicit consent
Attendance records and lists	Contextual data	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	
Afterschool, Easter and Summer club, Permissions and medical details		Current academic year then dispose	SECURE DISPOSAL	Term after departure from Academy	

Details of local authority social workers, APRO, LADO		Operational use	SECURE DISPOSAL	Term after departure from Academy	
Staff Lists		Operational use	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Diaries		Current year + 2 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Misc. Paperwork		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Lists of parents attendance at events		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Research & Development Centre NVQ/QCF					
Course Application forms	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Candidate folders/work (including CVs)	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Candidate QVF certificates (inc candidate reg. numbers)	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Area: R&D Centre Training					
School Direct Application forms (UCAS) - unsuccessful	contractual obligation	All the relevant information should be added to the staff personal file and all other	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

		information retained for 6 months			the function of public funded education
Foundation Degree Application Forms (UCAS) - unsuccessful	contractual obligation	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Accepted Foundation Degree Applications for Sep 2018 (UCAS)	contractual obligation	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
School Direct files for current and past students (including students qualifications / DBS)	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Current foundation degree students files (inc students qualifications / DBS / UCAS forms)	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Midas file (driving) – staff details	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Induction File (front copies of staff applications)	contractual obligation	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Postgraduate and Foundation degree Folders from past students	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Booking forms for courses Inc. name/school address	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Letters to individuals regarding courses / invoices etc.	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Email address and names of contacts from schools/settings on mailing lists	contractual obligation	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area__Assessment/Transport/CLA					
Behaviour data	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Annual review meetings	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Transport	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
CLA meetings	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Assessment/progress data/systems	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

					the function of public funded education
Area -Somewhere To Belong 12 week Pilot. March-May 2018 (0-3 provision/sessions)					
Early Years Developmental Journal	Management of assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Play Session Targets and Outcomes	Management of assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Deputies Offices- Joseph Clarke School					
Ongoing PCR documentation			SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Any current pupil documentation including medical reports, therapy reports,	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Mobility / SALT Office Joseph Clarke School					

Pupil Mobility records	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Ongoing Mobility programs	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
SALT records/notes	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Reprographics & Admin -Joseph Clarke School					
Pupil main files	Assessment data	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Free school meals documentation	Assessment data	Current year + 3 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Classrooms – Joseph Clarke School					
Termly Information file	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

					the function of public funded education
Class Welcome File	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Medical care plans	Management of individual student health care needs	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupil files containing PCR's / reports etc.	Assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area - Project SEARCH Whipps Cross Hospital					
Interview details Personal Details/Information Medical information EHCP Documents for HR	Assessment data	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Safeguarding information	Assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Photos of interns and power point presentations	Assessment data	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract

Office Camera	Assessment data		SECURE DISPOSAL	Term after departure from Academy	
Professional Photos CD	Assessment data	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Planning and Intern rotation updates	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	
Mass Storage Portal Hard drive Interns information past and present	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	
Promotional leaflets/ Newsletter	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Personal Mobile phones with work e-mails and Intern/parents contact numbers	Assessment data	Termination of employment then memory wipe	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Barts Health Desktop Computer	Assessment data		SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Photos Display Board in Base	Assessment data	Termination of employment	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Portfolios ASDAN/Induction folders Portfolios	Assessment data	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education