



# The Downland Federation Records Management Plan, Retention Schedule & Publication Scheme

Effective records management ensures compliance with legal obligations, supports institutional effectiveness, and safeguards the school's interests. This document outlines how the schools within The Downland Federation will manage records efficiently, transparently, and securely.

## 1. Scope

This policy applies to all records created, received, or maintained by federation staff during their duties. Records include all documents, both digital and physical, retained to evidence the federation school's transactions and activities.

## 2. Responsibilities

### **Executive Headteacher:**

- Holds overall accountability for records management across the federation.

### **Business Manager:**

- Responsible for implementing and overseeing records management practices.
- Maintains and disseminates clear guidelines for effective records management.
- Provides staff training and ongoing support.
- Ensures records are retrievable, secure, appropriately accessible, and disposed of according to policy.
- Conducts annual audits for compliance.

### **All Staff Members:**

- Ensure records within their control are accurate, up-to-date, and stored securely.
- Comply with guidelines on retention and disposal of records.
- Report any issues or breaches to the School Business Manager or Headteacher of the school promptly.

## 3. Relationship with Existing Policies

This Records Management Plan aligns with and supports:

- Freedom of Information Policy
- Data Protection Policy
- General Data Protection Regulation (GDPR, 2018)
- Audit compliance, equality, and ethical standards policies.

## 4. Arrangements for Archiving

- Records no longer in active use but required for legal or historical purposes will be archived securely.
- Clear records retention schedules (Appendix 2) will guide the archiving process.
- Records will be reviewed annually, and items exceeding their retention period will be securely deleted or destroyed to ensure compliance and maintain data security.

## 5. Archive Locations

- Physical records will be archived at a location designated by the Business Manager or the Headteacher of the school and held securely within each school premises, accessible only to authorised personnel. This will include the Archive Record (Appendix 1).
- Digital archives will be maintained securely with appropriate access controls and regular backups to ensure data integrity.

## Appendix 1:

### Archive Record

Only documents that are listed on the records retention schedule may be archived.

Box number	
Name of person who has prepared box for archive	
Date of archive	
What's in this box?	
Circle (per retention schedule)	Recycle   Secure Destruction
YEAR THAT RECYCLING OR DESTRUCTION MUST OCCUR?	

## Appendix 2:

### Downland Federation Retention Policy

1. Management of the School					
This section contains retention periods connected to the general management of the school. This covers the work of the Governing Body, the Headteacher and the senior management team, the admissions process and operational administration.					
1.1	Governing Body				
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
1.1.1	Agendas for Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff.		One copy should be retained with the master set of minutes. All other copies can be disposed of.	SECURE DISPOSAL
1.1.2	Draft Minutes of Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff.		Operational use	SECURE DISPOSAL
	Principal Set (signed)			PERMANENT	If the school is unable to store these then they should be offered to the County Archives Service.
	Inspection copies (anonymised such that they can be given to those who have authority to view upon request)			Date of meeting + 3 years	If these minutes contain any sensitive, personal information they must be shredded.

1.1.3	Reports presented to the Governing Body	There may be data protection issues if the meeting is dealing with confidential issues relating to staff.		Reports should be kept for a minimum of 6 years. However, if the minutes refer directly to individual reports then the reports should be kept permanently.	SECURE DISPOSAL or retain with the signed set of the minutes.
1.1.4	Meeting papers relating to the annual parents' meeting held under Section 33 of the Education Act 2002	No	Education Act 2002, Section 33.	Date of the meeting + a minimum of 6 years	SECURE DISPOSAL

<b>1.1 Governing Body</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
1.1.5	Instruments of Government including Articles of Association	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.
1.1.6	Trusts and Endowments managed by the Governing Body	No		PERMANENT	
1.1.7	Action plans created and administered by the Governing Body	No		Life of the action plan + 3 years	SECURE DISPOSAL
1.1.8	Policy documents created and administered by the Governing Body	No		Life of the policy + 3 years	SECURE DISPOSAL
1.1.9	Records relating to complaints dealt with by the Governing Body	Yes		Date of the resolution of the complaint + minimum of 6 years then review for further retention in case of contentious disputes.	SECURE DISPOSAL

1.1.10	Annual Reports created under the requirements of the Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	No	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No. 1171	Date of report + 10 years	SECURE DISPOSAL
1.1.11	Proposals concerning the change of status of a maintained school including Specialist Schools Status Schools and Academies	No		Date proposal accepted or declined + 3 years	SECURE DISPOSAL

<b>1.2 Headteacher and Senior Management Team</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
1.2.1	Log books of activity in the school maintained by the Headteacher	There may be data protection issues if the log book refers to individual students or members of staff		Date of last entry in the book + a minimum of 6 years then review	These could be of permanent historical value and should be offered to the County Archives Service if appropriate
1.2.2	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	There may be data protection issues if the minutes refer to individual students or members of staff		Date of the meeting + 1 year	SECURE DISPOSAL
1.2.3	Reports created by the Headteacher or the Management Team	There may be data protection issues if the report refers to individual students or members of staff		Date of the report + 1 term	SECURE DISPOSAL
1.2.4	Records created by Head-teachers, Assistant Headteachers, Heads of Year and other members of staff with	There may be data protection issues if the records refer to individual		Current academic year + 6 years then review	SECURE DISPOSAL

	administrative responsibilities	students or members of staff			
1.2.5	General correspondence created by Headteachers, Assistant Head-teachers, Heads of Year and other members of staff with administrative responsibilities (email, newsletters, trip letters)	There may be data protection issues if the correspondence refers to individual students or members of staff		Date of correspondence + 2 years	SECURE DISPOSAL
1.2.6	Professional Development Plans	Yes		Life of the plan + 3 years	SECURE DISPOSAL
1.2.7	School Development Plans	No		Life of the plan + 3 years	SECURE DISPOSAL

<b>1.3 Admission Process</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
1.3.1	All records relating to the creation and implementation of the School Admissions Policy	No	School Admissions Code Statutory Guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Life of the policy + 3 years then review	SECURE DISPOSAL
1.3.2	Admissions – if the admission is successful	Yes		Date of admission + 1 year	SECURE DISPOSAL
1.3.3	Admissions – if the appeal is unsuccessful	Yes		Resolution of case + 1 year	SECURE DISPOSAL
1.3.4	Register of Admissions	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the admission register must be preserved for a period of 3 years after the date on which the entry was made	
1.3.5	Admissions – Secondary Schools – Casual	Yes		Current year + 1 year	SECURE DISPOSAL

1.3.6	Proofs of address supplied by parents as part of the admissions process		School Admissions Code Statutory Guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Current year + 1 year	SECURE DISPOSAL
1.3.7	Supplementary information form including additional information such as religion, medical conditions, etc.	Yes			
	For successful admissions			This information should be added to the student file	SECURE DISPOSAL
	For unsuccessful admissions			Until appeals process completed	SECURE DISPOSAL

<b>1.4 Operational Administration</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
1.4.1	General file series	No		Current year + 5 years then REVIEW	SECURE DISPOSAL
1.4.2	Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 1 year	STANDARD DISPOSAL
1.4.3	Records relating to the creation and distribution of circulars to staff, parents or students	No		Current year + 1 year	STANDARD DISPOSAL
1.4.4	Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
1.4.5	Visitors' book and signing in sheets	Yes		Current month + 1 year (rolling year)	SECURE DISPOSAL



1.4.6	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 years then REVIEW	SECURE DISPOSAL
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## 2. Human Resources

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

### 2.1 Recruitment

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
2.1.1	All records leading up to the appointment of a new Headteacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
2.1.2	All records leading up to the appointment of a new member of staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
2.1.3	All records leading up to the appointment of a new member of staff – successful candidate	Yes		All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	SECURE DISPOSAL

### 2.1 Recruitment

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
2.1.4	Pre-employment vetting information – DBS checks	No	DBS update Service Employer Guide June 2014 Keeping children safe in education July 2015 (Statutory Guidance from Dept of Education) Sections 73, 74		
2.1.5	Proofs of identity collected as part of the process of checking	Yes		The SCR should record what documents were seen and	

	'portable' enhanced DBS disclosure			checked and by whom. If copies of documentation are kept, they should be placed on the member of staff's personal file	
2.1.6	Pre-employment vetting information – evidence proving the right to work in the United Kingdom	Yes	An employer's guide to right to work checks (Home Office May 2015)	To be added to the Staff Personal File (see below)	
<b>2.2 Operational Staff Management</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
2.2.1	Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years	SECURE DISPOSAL
2.2.2	Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
2.2.3	Annual appraisal/assessment records	Yes		Current year + 3 years	SECURE DISPOSAL
<b>2.3 Management of Disciplinary and Grievance Procedures</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
2.3.1	Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Yes	Keeping children safe in education statutory guidance for schools and colleges March 2015. Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015	Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file, a copy must be provided to the person concerned.	SECURE DISPOSAL These records must be shredded

2.3.2	Disciplinary proceedings	Yes			
	Warnings Index showing type, date and expiry date of active warnings	Yes		Live document, continually updated to only show in-force warnings. Expired warnings to be removed as documents are removed from personnel files.	N/A
	Oral warning			Date of warning + 6 months	SECURE DISPOSAL (If warnings are placed on personal files then they must be weeded from the file)
	Written warning and evidence			Date of warning + 12 months	
	Final warning and evidence			Date of warning + 18 months	
	Case not found			If the incident is child protection related then see above otherwise dispose of at the conclusion of case	
<b>2.4 Health and Safety</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
2.4.1	Health and Safety Policy Statements	No		Life of policy + 3 years	SECURE DISPOSAL
2.4.2	Health and Safety Risk Assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL
2.4.3	Records relating to accident/injury at work	Yes		Date of incident + 12 years. In the case of serious accidents a further retention period will need to be applied.	SECURE DISPOSAL
2.4.4	Accident Reporting	Yes	Social Security (Claims and Payment(s) Regulations 1979 Regulation		

			25. Social Security Administration Act 1992 Section 8 Limitation Act 1980.		
	Adults			Date of incident + 6 years	SECURE DISPOSAL
	Children			DOB of child + 25 years	SECURE DISPOSAL
2.4.5	Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11. Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2).	Current year + 40 years	SECURE DISPOSAL
2.4.6	Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL
2.4.7	Process of monitoring of areas where employers and persons are likely to have become in contact with radiation	No		Last action + 50 years	SECURE DISPOSAL
2.4.8	Fire precaution log books	No		Current year + 6 years	SECURE DISPOSAL
<b>2.5 Payroll and Pensions</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
2.5.1	Maternity pay records	Yes	Statutory Maternity Pay (General)	Current year + 3 years	SECURE DISPOSAL

			Regulations 1986 (SI 1986/1960) revised 1999 (SI 1999/567)		
2.5.2	Records held under Retirement Benefits Scheme (Information Powers) Regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL

### 3. Financial Management of the School

This section deals with all aspects of the financial management of the school including the administration of school meals.

#### 3.1 Risk Management and Insurance

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
3.1.1	Employers' Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL

#### 3.2 Asset Management

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
3.2.1	Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
3.2.2	Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL

#### 3.3 Accounts and Statements including Budget Management

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
3.3.1	Annual Accounts	No		Current year + 6 years	STANDARD DISPOSAL
3.3.2	Loans and grants managed by the school	No		Date of last payment of the loan + 12 years then REVIEW	SECURE DISPOSAL
3.3.3	Student Grant applications	Yes		Current year + 1 year	SECURE DISPOSAL
3.3.4	All records relating to the creation and management of budgets including the Annual Budget statement and background papers	No		Life of the budget + 3 years	SECURE DISPOSAL

3.3.5	Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL
3.3.6	Records relating to the collection of banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
3.3.7	Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL
<b>3.4 Contract Management</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
3.4.1	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
3.4.2	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL
3.4.3	Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL
<b>3.5 School Fund</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
3.5.1	School fund – cheque books	No		Current year + 6 years	SECURE DISPOSAL
3.5.2	School fund – paying in books	No		Current year + 6 years	SECURE DISPOSAL
3.5.3	School fund – ledger	No		Current year + 6 years	SECURE DISPOSAL
3.5.4	School fund – invoices	No		Current year + 6 years	SECURE DISPOSAL
3.5.5	School fund – receipts	No		Current year + 6 years	SECURE DISPOSAL
3.5.6	School fund – bank statements	No		Current year + 6 years	SECURE DISPOSAL
3.5.7	School fund – journey books	No		Current year + 6 years	SECURE DISPOSAL
<b>3.6 School Meals Management</b>					
	<b>Basic File Description</b>	<b>Data Protection Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period (Operational)</b>	<b>Action at the end of the administrative life of the record</b>
3.6.1	Free School Meals Registers	Yes		Current year + 1 year	SECURE DISPOSAL
3.6.2	School meals registers	Yes		Current year + 1 year	SECURE DISPOSAL

3.6.3	Schools meals summary sheets	No		Rolling term whilst on roll	SECURE DISPOSAL
	Cash catering			Rolling term whilst on roll	SECURE DISPOSAL
	Cashless catering			Rolling term whilst on roll	SECURE DISPOSAL

#### 4. Property Management

This section covers the management of buildings and property.

##### 4.1 Property Management

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
4.1.1	Title deeds of properties belonging to the school	No		PERMANENT These should follow the property unless the property has been registered with the Land Registry	
4.1.2	Plans of property belonging to the school	No		These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold	
4.1.3	Leases of property leased by or to the school	No		Expiry of lease + 6 years	SECURE DISPOSAL
4.1.4	Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL

##### 4.2 Maintenance

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
4.2.1	All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
4.2.2	All records relating to the maintenance of by school employees including maintenance log books	No		Current year + 6 years	SECURE DISPOSAL

## 5. Student Management

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

### 5.1 Student's Educational Record

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
5.1.1	Student's educational record required by the Education (Pupil Information) (England) Regulations 2005	Yes	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No 1437		
	Secondary	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the student + 25 years	SECURE DISPOSAL
5.1.2	Examination Results – Student Copies	Yes			
	Public			This information should be added to the student file	All uncollected certificates should be returned to the examination board at end of following year
	Internal			This information should be added to the student file	
5.1.3	Child Protection Information held on student's file	Yes	"Keeping children safe in education Statutory guidance for schools and colleges March 2015"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015"	If any records relating to child protection issues are placed on the student file, it should be in a sealed envelope and then retained for the same period of time	SECURE DISPOSAL – these records MUST be shredded



				as the student file	
5.1.4	Child protection information held in separate files	Yes	"Keeping children safe in education Statutory guidance for schools and colleges March 2015"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015"	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 – these records MUST be shredded

Retention periods relating to allegations made against adults can be found in the Human Resources section of this retention schedule.

## 5.2 Attendance

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
5.2.1	Attendance registers	Yes	School attendance Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the attendance register must be preserved for a period of 3 years after the date on which the entry was made.	SECURE DISPOSAL
5.2.2	Correspondence relating to authorised absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

## 5.3 Special Educational Needs

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative
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					life of the record
5.3.1	Special Education Needs files, reviews and individual education plans	Yes	Limitation Act 1980 (Section 2)	DOB of student + 25 years then REVIEW	SECURE DISPOSAL unless the document is subject to a legal hold
5.3.2	Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	DOB of the student + 25 years (This would normally be retained on the student file)	SECURE DISPOSAL unless the document is subject to a legal hold
5.3.3	Advice and information provided to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2		
5.3.4	Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14		

## 6. Curriculum Management

### 6.1 Student's Educational Record

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
6.1.1	Curriculum returns/option forms	No		Current year + 3 years	SECURE DISPOSAL
6.1.2	Examination results (schools copy)	Yes		Current year + 3 years with details; up to 6 years if anonymised	SECURE DISPOSAL
	SATs records	Yes			
	Results			Recorded on the student's educational file and retained until the student is aged 25 years. Composite anonymised records of all the whole year SATs results can be retained for the current year + 6 years.	SECURE DISPOSAL
	Examination Papers			The examination papers should be kept until any appeals/ validation process is complete.	SECURE DISPOSAL

<b>6.1 Student's Educational Record</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
6.1.3	Published Admission Number (PAN) reports	Yes		Current year + 6 years	SECURE DISPOSAL
6.1.4	Value Added and Contextual Data	Yes		Current year + 3 years with details then anonymised for a further + 3 years	SECURE DISPOSAL
6.1.5	Self-Evaluation forms	Yes		Current year + 3 years	SECURE DISPOSAL

<b>6.2 Implementation of Curriculum</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
6.2.1	Schemes of work	No		Current year + REVIEW	
6.2.2	Timetable	No		Current year + REVIEW	
6.2.3	Class Record Books	Yes		Duration of course + 1 year	
6.2.4	Mark Books	Yes		Duration of course + 1 year	
6.2.5	Record of homework set	No		Duration of course + 1 year	
6.2.6	Students' work	No		Duration of course + 1 year	

<b>7. Extra Curricular Activities</b>					
<b>7.1 Educational Visits outside the classroom</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
7.1.1	Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools	No	Outdoor Education Advisers Panel Education National Guidance website <a href="http://oeaping.info/">http://oeaping.info/</a> specifically Section 3 'Legal Framework and Employer Systems' and Section 4 – 'Good Practice'	Date of visit + 10 years	SECURE DISPOSAL

<b>7.1 Educational Visits outside the classroom</b>					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
7.1.2	Parental consent forms for school trips	Yes		Conclusion of the trip	SECURE DISPOSAL

	where there has been no major incident				
7.1.3	Parental permission slips for school trips – where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	DOB of the student involved in the incident + 25 years. The permission slips for all the students on the trip need to be retained to show that the rules had been followed for all students	SECURE DISPOSAL, timed with disposal of the affected student's file

## 8. Central Government and Local Authority

### 8.1 Local Authority

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
8.1.1	Secondary Transfer Sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
8.1.2	Attendance returns	Yes		Current year + 1 year	SECURE DISPOSAL
8.1.3	School Census returns	No		Current year + 5 years	SECURE DISPOSAL
8.1.4	Circulars and other information sent from the Local Authority	No		Operational use	SECURE DISPOSAL

### 8.2 Central Government

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
8.2.1	OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
8.2.2	Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL
8.2.3	Circulars and other information sent from central government	No		Operational use	SECURE DISPOSAL

# Appendix 3:

## Publication Scheme

### 1. Introduction

This Publication Scheme is prepared under the Freedom of Information Act 2000 and outlines the information routinely published by all schools within our federation: The Downs School, Beedon C.E. School, Compton C.E. School, and Basildon C.E. School. The scheme demonstrates our commitment to transparency while adhering to the Data Protection Act 2018 and UK GDPR to safeguard personal and sensitive information.

### 2. Scope

This scheme applies to all recorded information held by the federation's schools. It encompasses information available on individual school websites and other materials provided on request.

### 3. Classes of Information

The following categories detail the types of information routinely published across all schools:

- a. Who We Are and What We Do
  - Federation and individual school missions, values, and ethos.
  - Organisational structure, including federation leadership and staff roles at each school.
  - Governing body membership and their responsibilities.

Contact details for each school:

**The Downs School:** Compton, West Berkshire, RG20 6AD

**Beedon C.E. School:** Stanmore Road, Beedon, RG20 8SL

**Compton C.E. School:** School Road, Compton, RG20 6QU

**Basildon C.E. School:** School Lane, Upper Basildon, RG8 8PD

- b. What We Spend and How We Spend It
  - Annual financial reports for each school.
  - Details of specific funding streams (e.g., Pupil Premium, Sports Premium).
  - Policies governing procurement and financial accountability.
- c. What Our Priorities Are and How We Are Doing
  - School improvement plans for each school.

- Key performance data (e.g., exam results for The Downs School, Ofsted reports for all schools).
  - Inclusion and diversity objectives.
- d. How We Make Decisions
- Governing body meeting minutes (excluding confidential items).
  - Admissions policies and criteria for each school.
  - Strategic planning documents.
- e. Our Policies and Procedures
- Federation-wide and school-specific policies, including:
  - Safeguarding and child protection.
  - Complaints handling.
  - Data protection and privacy.
  - Non-statutory policies such as curriculum plans and accessibility.
- f. Lists and Registers
- Curriculum offerings for each school.
  - Asset registers (non-confidential items).
  - Governance roles and responsibilities.
- g. The Services We Offer
- Extra-curricular programs across the schools.
  - Support services for students (e.g., SEN provisions).
  - Publications such as newsletters and bulletins.

## 4. Environmental Information

The federation is committed to proactively publishing any environmental information held by our schools, in line with the Environmental Information Regulations 2004.

## 5. Publishing Datasets and Reuse

In accordance with the Re-use of Public Sector Information Regulations 2015, the federation will publish datasets that are requested and make them available in a format that is reusable where reasonably practicable. If the dataset contains a

relevant copyright work and the federation is the copyright owner, the dataset will be available for reuse under the terms of the Freedom of Information Act.

## 6. Accessibility Commitments

The federation is committed to ensuring all published information is accessible to all members of the public. Information will be provided:

- In the language in which it is held or translated as legally required.
- In formats that comply with disability and discrimination legislation.
- In alternative forms or formats where necessary to meet individual needs.

## 7. Accessing Information

Information is accessible through the following:

**Websites:**

- [The Downs School](#)
- [Beedon C.E. School](#)
- [Compton C.E. School](#)
- [Basildon C.E. School](#)

**Contact Information:**

For general information requests, FOI requests, or Subject Access Requests (SARs), contact the federation's Data Protection Officer:

**Tom Mannion**

**Email:** [tmannion@tds.school](mailto:tmannion@tds.school)

**Postal Address:** The Downs School, Compton, West Berkshire,  
RG20 6AD

## 8. Charges

The Downland Federation is committed to providing information wherever possible without charge. However, charges may apply for the costs associated with providing certain information. These charges ensure the federation can recover reasonable expenses incurred while handling requests.

Charges may apply in the following circumstances:

- Photocopying and Printing: Fees will be charged per page and will depend on whether the copies are in black and white or colour. Specific charges are detailed in the schedule of charges available on our website.
- Postage and Packaging: The actual cost of postage will apply, depending on the weight and size of the materials being sent.
- Preparation of Information: Charges may be applied for the time required prepare information that involves significant staff effort, such as:

- Compiling large datasets.
- Redacting sensitive or exempt information.
- Processing complex requests.

If a charge is to be made, confirmation of the payment due will be provided before the information is supplied. Payment may be requested prior to the provision of the requested information.

For clarity and transparency, a detailed [schedule of charges](#) is published on our website [here](#).

## 9. Complaints Procedure

If you are dissatisfied with the handling of your request or the information provided, you may contact the Data Protection Officer at [tmannion@tds.school](mailto:tmannion@tds.school). Complaints unresolved by the federation can be referred to the Information Commissioner's Office (ICO).

## 10. Review and Updates

The scheme is reviewed annually by the federation governing body and updated as necessary to ensure compliance with all legal requirements.