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Inspire Education Trust
RECORD RETENTION SCHEDULE
AGREED
October 2021

This retention schedule contains recommended retention periods for the different record series created and maintained by the schools Data Protection Officer. This schedule refers to all information regardless of the media in which it is stored (if records are retained electronically any backup copies should be destroyed at the same time). Some of the retention periods are governed by statute. Others are guidelines following best practice. Every effort has been made to ensure that these retention periods are compliant with the requirements of the General Data Protection Regulations 2016. Except for those that are governed by statute, if record series are to be kept for longer or shorter periods than laid out in this document, the reasons for this need to be documented.

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Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
1. Child Protection				
1.1 Child Protection Files	Yes	Education Act 2002, s175, related guidance "Safeguarding Children in Education" September 2004.	DOB + 25 years Review periodically if necessary to retain for longer period of time (independent inquiry into Child Sexual Abuse)	SECURE DISPOSAL
1.2 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. Details of allegations that are found to be malicious should be removed from personnel records.	SECURE DISPOSAL- MUST BE SHREDDED

NB: 1 year means 1 academic year.

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
2. Governors and Gove				100010
2.1 Minutes	If dealing with confidential issues		Permanent	SECURE DISPOSAL
Principal Set			Permanent	Stored at individual schools
Inspection Minutes			Date of meeting + 3 years	SECURE DISPOSAL
2.2 Agendas	If dealing with confidential issues		One copy to be retained with master set of minutes. All other copies to be disposed of.	SECURE DISPOSAL
2.3 Trusts and Endowments	No		Should be retained with master set of minutes. All other copies to be disposed of	Archive if closed
2.4 Instrument of Government	No		Should be retained at the registered office whilst the academies are open	Archive if closed
2.5 Reports	If containing confidential information about staff		Date of report + minimum 6 years or if minutes refer directly to individual reports then kept in existence with referenced report.	SECURE DISPOSAL or retain with signed set of minutes
2.6 Annual Reports required by the Department for Education	No	Education (Governors' Annual Reports) (England)(Amendment)Regulations 2002.SI 2002 No 1171	Date of report + 10 years	SECURE DISPOSAL
2.7 Action Plans	No		Date of action plan + 3 years	SECURE DISPOSAL

2.8 Policy Documents	No		Retain in school whilst policy is operational (this includes if the expired policy is part of a past	SECURE DISPOSAL
2.9 Records relating to complaints dealt with by the governing body	Yes	Limitation Act 1980	decision making process) Date of resolution of complaint + 6 years then review in case of contentious disputes	SECURE DISPOSAL
2.10 Proposals for schools to become or be established as Specialist Status schools	No		Date proposal accepted or declined +3 years	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
3. Chief Executive, Head	d Teacher and Se	enior Management Team		
3.1 Minutes of the	Yes if		Date of meeting + 3 years then	SECURE DISPOSAL
ELT/Senior Management	reference to		review	
Team and other internal	individuals			
administrative bodies				
3.2 Reports made by the	Yes if		Date of report + minimum 6 years	SECURE DISPOSAL
Chief Executive,	reference to		then review	
Headteacher or the	individuals			
Management Team				
3.3 Records created by	Yes if		Closure of file + 6 years	SECURE DISPOSAL
Chief Executive,	reference to			
Headteachers, Assistant	individuals			
Headteachers, and other				

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members of staff with administrative responsibilities			
3.4 Correspondence created by Chief Executive, Headteachers, Assistant Headteachers, and other members of staff with administrative responsibilities	Yes if reference to individuals	Date of correspondence + 3 years then review	SECURE DISPOSAL
3.5 Professional development plans	Yes	Life of the plan + 6 years	SECURE DISPOSAL
3.6 School development plans	No	Life of the plan + 3 years	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
4. Admissions Process				
4.1 All records relating to the creation and implementation of the School Admissions Policy	No	School Admission Code Statutory Guidance for admission authorities, governing bodies, school adjudicators and admission appeals panels December 2014	Life of the Policy + 3 years then review	SECURE DISPOSAL
4.2 Admissions -if the admission is successful	Yes	School Admission Code Limitation Act 1980	Date of admission + 1 year and added to pupil file	SECURE DISPOSAL

4.3 Admission – if the appeal was unsuccessful	Yes	School Admission Code Statutory Guidance for admission authorities, governing bodies, school adjudicators and admission appeals panels December 2014	Resolution of case + 1 year	SECUIRE DISPOSAL
4.4 Registry of admissions	Yes	School attendance: School attendance guidance for maintained schools, academies, independent schools and local authorities November 2016.	Preserved for 3 years after entry	Schools must notify the local authority when a pupil's name is to be deleted from the admission register under regulation 8 of the Education (Pupil Registration) (England) Regulations 2006 SECURE DISPOSAL
4.5 Proofs of address supplied by parents as part of the admissions process	Yes		Current year + 1 year	SECURE DISPOSAL
4.6 Supplementary Information form including additional information such as religion, medical conditions etc.	Yes		End of student relationship + 1 year	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
5. Pupils		-		
5.1 Admission Registers	Yes		Current year of last entry + 6 years	SECURE ARCHIVE UNTIL Date of Destruction
5.2 Attendance registers	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities 2016.	Date of Register + 3 years	SECURE DISPOSAL [If these records are retained electronically any backup copies should be destroyed at the same time]
5.3 Student Educational Record	Yes	Education (Student Information) (England) Regulations 2005 SI 2005 No. 1437 Limitation Act 1980 (Section 2)	DOB of the students + 25 years Retain if relevant to Part 1 of this schedule	SECURE DISPOSAL
5.3a. PRIMARY			Retain whilst the child remains at the school	This file should follow the pupil when he/she leaves the primary school: • To another primary school • To a secondary school • To a pupil referral unit • If the pupil dies whilst at primary school the file should be returned to the Local Authority and be retained for statutory retention. If the pupil decides to

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			transfer to an independent school, home schooling or leaves the country, the file should be returned to the Local Authority.
5.4 Special Educational Needs Files, review and Individual Education plans	Yes	Until end of pupil relationship (primary) DOB of the student + 25 years then review (Secondary)	Passed on to secondary school. Electronic records may be stored for a period of 3 years SECURE DISPOSAL
5.5 Correspondence relating to Authorised Absence and Issues	No	Date of absence + 2 years; if kept on education record please refer to 5.3; if kept on attendance register refer to 5.2	SECURE DISPOSAL
5.6 Examination results (Public)	No	This information should be added to the student file	All uncollected certificates should only be retained for 2 years following which if not returned to the awarding body SECURE DISPOSAL
5.6a Examination results (Internal)	Yes	This information should be added to the student file	If these records are retained on the student file or in the National Record of Achievement they need only to be kept as long as operationally necessary. SECURE DISPOSAL

5.7 Child Protection Information held on student 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"	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 as the student file.	SECURE DISPOSAL – these records must be shredded
5.8 Child Protection Information held on 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"	End of relationship with student + 1 year on the understanding that the principal copy of this information will remain with Local Authority social services. Electronic copies must be removed from the school(s) MIS within the same period	SECURE DISPOSAL – these records must be shredded
5.9 Any other records created in the course of contact with students e.g. conduct/behaviour records	Yes/No		Termination of relationship with student + 3years if kept electronically (Primary) Kept on education file DOB + 25 years (secondary)	Review if incident or passed to secondary/alternative school or SECURE DISPOSAL Review if incident or SECURE DISPOSAL
5.10 Student work	Yes		Return to student at end of academic year. If not possible, retain for current academic year + 1 year	SECURE DISPOSAL
Basic File Description 6. School Trips and Extr	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record

6.1 Parental permission slips for school trips - where there has been no major incident	Yes		Conclusion of the trip	Although the consent forms could be retained for DOB + 25 years, the requirement for them is low. Possible to archive.
6.2 Parental permission slips for school trips - where there has been a major incident	Yes	Limitation Act 1980	DOB of the pupil involved in the incident + 25 years The permission slips for all pupils on the trip need to be retained to show that the rules had been followed for all pupils	SECURE DISPOSAL
6.3 Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Primary Schools	No	Outdoor Education Advisers' Panel National Guidance website hhtp://oeapng.info specifically section 3 – "Legal Framework and Employer Systems" and Section4 "Good Practice".	Date of visit + 14 years Evolve	SECURE DISPOSAL
6.4 Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Secondary Schools	No	Outdoor Education Advisers' Panel National Guidance website hhtp://oeapng.info specifically section 3 – "Legal Framework and Employer Systems" and Section4 "Good Practice".	Date of visit + 10 years Evolve	SECURE DISPOSAL
6.5 Walking Bus registers	Yes		Date of register + 3 years This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report and kept	SECURE DISPOSAL [Electronic back-ups to be destroyed at the same time]

for the period of time required for	
accident reporting	

Basic File Description 7. Special Educational N	Data Protection Issues Jeeds	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
7.1 SEN files, reviews and individual educational plans	Yes	Limitation Act 1980	End of pupil relationship and passed to secondary school + 3 years where this is stored on the IMS (Primary) Secondary: DOB + 25 years (maintained in student file)	Review Note: Some Local Authorities will keep SEN files for a longer period of time in case of a claim. Business risk analysis.
7.2 EHC under section 37 The Children and Families Act 2014	Yes		End of pupil relationship + 3 years if stored on IMS (Primary) Secondary: End of the academic year in which the student reaches 25 years (maintained in student file) or until they leave the education establishment	Review and SECURE DISPOSAL
7.3 Advice and information to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	End of pupil relationship (Primary) Secondary: End of the academic year in which the student reaches 25 years (maintained in student file)	SECURE DISPOSAL unless subject to a legal hold

			or until they leave the education establishment	
7.4 Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14		SECURE DISPOSAL unless subject to a legal hold

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
8. Curriculum				
8.1 Curriculum returns (expected outcomes for learning)	No		Current year + 3 years	SECURE DISPOSAL
8.2 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 SECURE DISPOSAL
8.3 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 SECURE DISPOSAL
8.4 Class record sheets	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and

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			allocate a new retention period or SECURE DISPOSAL
8.5 Mark Books / Personalised Assessment sheet	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 SECURE DISPOSAL
8.6 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 SECURE DISPOSAL
8.7 Students' work	Potentially	Current year + 1 year OR return to pupil at the end of the academic year where possible.	SECURE DISPOSAL
8.8 Examination Papers	Yes	Examination papers should be kept until any further appeal/validation process is complete.	SECURE DISPOSAL PSEUDONYMISATION
8.9 PAN Reports	Yes	Termination of student at primary school transferred to secondary. Secondary kept on pupil file.	SECURE DISPOSAL
8.10 Value added and contextual Data	Yes	Termination of student at primary school transferred to secondary. Secondary kept on pupil file.	SECURE DISPOSAL

8.11 Self Evaluation forms	Yes	Termination of student at primary	SECURE DISPOSAL
		school transferred to secondary.	
		Secondary kept on pupil file.	

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
9. Recruitment				
9.1 All records leading up to the appointment of a new Head Teacher	Yes		Date of Appointment + 6 years	SECURE DISPOSAL
9.2 All records leading up to the new appointment of a new member of staff- unsuccessful candidate	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
9.3 All records leading up to the new appointment of a new member of staff- successful candidate	Yes		All relevant information to be added to staff personal file and all other info retained for 6 months	SECURE DISPOSAL
9.4 Interview notes and recruitment records	Yes		Date of interview + 6 months	SECURE DISPOSAL
9.5 Pre-employment vetting information - DBS checks	Potential	DBS Update service Employer Guide June 2014: Keeping children safe in education July 2015 (Dept. Education s73, 74).	The school does <b>NOT</b> have to keep DBS certificates. If the schools does, do not keep for more than 6 months.	SECURE DISPOSAL

9.6 Pre-employment vetting information – Evidence proving the right to work in the UK.	Yes	An employer's guide to right to work checks issued by the Home Office	Store on staff personal file for duration of their employment + 2 years	SECURE DISPOSAL
9.7 Proof of identity collected as part of the 'portable' enhanced DBS disclosure.	Yes		Where possible these should be checked and a note kept of what was seen and checked. If it is felt necessary to keep copy documentation then this should be placed on the member of staff's personal file.	SECURE DISPOSAL
9.8 Timesheets, sick pay	Yes		Current year + 6 years	SECURE DISPOSAL
9.9 Staff Personal files	Yes	Limitation Act 1980 (section 2)	Date of termination + 6 years	SECURE DISPOSAL
9.10 Disciplinary proceedings:		ing relates to child protection issues see 1.2 pontact your safeguarding children officer for		s relate to a child protection
9.10a oral warning	Yes		The school may wish to	SECURE DISPOSAL
9.10b written warning level 1	Yes		keep this information on	SECURE DISPOSAL
9.10c written warning level 2	Yes		the staff personnel file	SECURE DISPOSAL
9.10d final warning	Yes			SECURE DISPOSAL
9.10e case not found	Yes		If incident is child protection related see 1.2 otherwise dispose of at conclusion of the case. / review if necessary	SECURE DISPOSAL

9.11 Records relating to accident/injury at work	Yes	Date of incident + 7 years or if kept on staff file then refer to personal file years. In the case of serious accidents a further retention period will need to be applied
9.12 Annual appraisal/assessment records	Yes	Duration of time of School SECURE DISPOSAL members of staff that are no longer at the school current year + 5 years

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
10. Health and Safety				
10.1 Health and Safety Policy Statement	No		Life of Policy + 3 years	SECURE DISPOSAL
10.2 Accessibility Plans	No	Equality Act 2010	Current year + 6 years	SECURE DISPOSAL
10.3 Accident reporting:	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 JSP 375 Pt.2 Vol 1 (V1.0 Jan 16) Government Guidance		Retain copy of Health and Safety Policy published at the time of the accident with this file.
Adults			Date of incident + 6 years	SECURE DISPOSAL
Children			DOB + 25 years	SECURE DISPOSAL

10.4 Control Of Substances Hazardous to Health OSHH	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
10.5 Risk Assessments and Personal Evacuation Plans	Potentially		Life of risk assessment + 3 years	SECURE DISPOSAL
10.6 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
10.7 Process of monitoring of areas where employees and persons are likely to have come in contact with radiation	No		Last action + 50 years	SECURE DISPOSAL
10.8 Emergency Evacuation log books	No		Current year + 6 years	SECURE DISPOSAL
10.9 CCTV footage	Yes		Automatically destroyed after 30 days unless investigation. End of investigation + review.	SECURE DISPOSAL

Basic File Description	Data Protection	Statutory Provisions	Retention Period	Action at the end of
	Issues			administrative life of the
				record

11. Administrative			
11.1 General Files series	No	Current year + 5 years the review	en SECURE DISPOSAL
11.2 Records relating to the creation and publication of the school brochure or prospectus	No	Current year + 3 years	STANDARD DISPOSAL
11.3 Records of circulars to staff parents or pupils	No	Current year + 1 year	STANDARD DISPOSAL
11.4 Newsletters and items with short operational use	No	Current year + 1 year	STANDARD DISPOSAL
11.5 Visitors Books and Signing in sheets	Yes	Current year + 6 years the review	en SECURE DISPOSAL
11.6 PTA/Old Pupils Associations		Current year + 6 years the review	en Review to see whether a further retention period is required

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
12. Asset management a	nd Insurance			
12.1 Employer's Liability certificate	No		School Closure + 40 years	SECURE DISPOSAL
12.2 Inventories of equipment and furniture	No		Current year + 6 years	SECURE DISPOSAL
12.3 Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
13. Finance				
13.1 Annual Accounts	No	Financial Regulations	Current year + 6 years	STANDARD DISPOSAL
13.2 Loans and grants	Yes	Financial Regulations	Date of last payment on loan + 12 years then review	Review to see whether further retention is
				necessary
13.3 Contracts	No			
13.3a under seal	No	Limitation Act 1980	Last payment+ 12 years	SECURE DISPOSAL
13.3b under signature	No	Limitation Act 1980	Last payment + 6 years	SECURE DISPOSAL
13.3c monitoring records			Current year + 2 years	SECURE DISPOSAL
13.4 Copy orders	No		Current year + 2 years	SECURE DISPOSAL
13.5 Budget reports, budget monitoring, budget statements etc.	No		Life of budget + minimum 3 years	SECURE DISPOSAL
13.6 Invoice, receipts, other	No		Current financial year + 6	SECURE DISPOSAL
records covered by the			years	
Financial Regulations				
13.7 Annual Budget and background papers	No		Current financial year + 6 years	SECURE DISPOSAL

13.8 Order books and	No		Current financial year + 6	SECURE DISPOSAL
requisitions			years	
13.9 Delivery	No		Current financial year + 6	SECURE DISPOSAL
Documentation			years	
13.10 Debtors' Records,	No	Limitation Act 1980	Current financial year + 6	SECURE DISPOSAL
Collection and Banking			years	
monies				
3.11 Student grant	Yes		Current year + 6 years	SECURE DISPOSAL
applications				
13.12 School meals	No		Current year + 3 years	SECURE DISPOSAL
summary sheet				

14. Payroll				
14.1 Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567)	Current year + 6 years	SECURE DISPOSAL
14.2 Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year+ 6 years	SECURE DISPOSAL

Basic File Description 15. Property	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
	No		Permanent- These should follow the property unless the property has been	

		registered at the Land Registry	
15.2 Plans of property belonging to the school	No	Permanent	Retain in school whilst operational
15.3 Maintenance and contractor records	No	Current year + 6 years	SECURE DISPOSAL
15.4 Leases of property belonging to the school	No	Expiry of lease + 6 years	SECURE DISPOSAL
15.5 Record relating to the Lettings of school premises	No	Current financial year + 6 years	SECURE DISPOSAL
15.6 Maintenance log books	No	Current year + 6 years	SECURE DISPOSAL
15.7 Contractors' Reports	No	Current year + 6 years	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
16. Local Authority				
16.1 Secondary transfer sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
16.2 Attendance returns	Yes		Current year + 1 year	SECURE DISPOSAL
16.3 Circulars from Local Authority	No		Whilst required operationally then review	SECURE DISPOSAL
16.4 Census Returns	No		Operational Use	SECURE DISPOSAL

Basic File Description	Data Protection	Statutory Provisions	Retention Period	Action at the end of
	Issues			administrative life of the record
17. Central Government				

17.1 OFSTED reports and	No	Life of report then	SECURE DISPOSAL
papers		review	
17.2 Returns	No	Current year + 6 years	SECURE DISPOSAL
17.3 Circulars from	No	Operational Use	SECURE DISPOSAL
Department for Children,			
Schools and Families			

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
18. External agreemer	nts			
18.1 Service Level Agreements	Potential		Retained with financial returns current year + 6 Until superseded	SECURE DISPOSAL
18.2 Data sharing agreements	Potential		Until superseded	SECURE DISPOSAL
18.3 Work experience agreements	Yes		DOB of pupil + 25 years	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
19. School Meals	I		1	
19.1 Dinner Register	Yes		Current year + 3	SECURE DISPOSAL
			years	
19.2 School meals summary			Current year + 3	SECURE DISPOSAL
sheets			years	

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
20. Attendance and Welfare				
20.1 Reports for outside agencies - where the report has been included on the case file created by the outside agency	Yes		Termination of pupil relationship	SECURE DISPOSAL
20.2 Referral forms	Yes		While the referral is current	SECURE DISPOSAL
20.3 Contact data sheets	Yes		Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL
20.4 Contact data base entries			Current year then review, if contact is no longer active then destroy	DELETE
20.5 Group Registers	Yes		Current year + 2 years	SECURE DISPOSAL

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of administrative life of the record
21. Data Protection				
21.1 Subject Access Requests	Yes	Business need	If responded: current year + 2 years then review (depending on request complexity/if supervisory authority involved)	Review +SECURE DISPOSAL

20.2 Freedom of Information	No	Business need	Current academic year + 2	Review + DISPOSAL
Requests			years	