



A collaboration of schools which enhances the educational experiences and outcomes for children, maximizing the benefits of working together, whilst maintaining the individual culture and ethos of each individual school

RETENTION OF RECORDS SCHEDULE

Author:	Lead Governance Professional
Approver:	People & Pay Committee
Date:	2 nd June 2026
Next review:	June 2029 unless there are earlier statutory or guidance changes
Category of policy:	Trust Board

Changes history

Version:	Date:	Amended by:	Substantive changes:	Purpose:
1			New trust policy	

Secure disposal = if paper via Trust's confidential waste disposal service. If electronic record via deletion of the record.

Records may be held electronically or on paper.

Agape MAT document: This is a Trust document which means it must be followed by all schools in Agape MAT.

Management of the Trust					
1.1 The Trust Board/Local Governing Committees					
	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 and papers for consideration at Trust Board and Committee meetings (including Local Governing Committees)	There may be data protection issues if the meeting is dealing with confidential issues relating to employees or pupils		One copy should be retained permanently (electronically or paper). All other copies can be disposed of.	Secure disposal
1.1.2	Signed minutes of The Trust Board and their Committees (including Local Governing Committees)	There may be data protection issues if the meeting is dealing with confidential issues relating to employees or pupils		Permanent	Trust Board and their committee minutes are stored at the Head Office of the Trust. LGC minutes will be stored at the respective school.
1.1.3	Instruments of Governance for example articles of association, funding agreements	No		Permanent (stored electronically and sealed copies held in paper form)	Stored at the Head Office of the Trust
1.1.4	All records relating to the conversion of the schools to academy status	No		Life of the organisation then consult local archives before disposal	Secure disposal
1.1.5	Scheme of delegation	No	Companies Act 2006 S.355	Life of the document + 10 years	Secure disposal

1.1.6	Records relating to the management of general member meetings and records	Unlikely to contain personal information	Companies Act 2006 S.248	Date of meeting + 10 years	Secure disposal
1.1.7	Signed minutes of general member meetings	Unlikely to contain personal information		Permanent	Stored at the Head Office of the Trust
1.1.8	Records relating to member special and general resolutions	No		Life of the Trust	Stored at the Head Office of the Trust
1.1.9	Records relating to the appointment of Members, Directors/Trustees and Governors and signed code of conduct	Yes		Date of termination + 6 years	Stored at the Head Office of the Trust (or respective school where the record relates to governors on the LGC)
1.1.10	Records relating to director disqualification	Yes	The Education (Company Directors Disqualification) Act 1986: Amendments to Disqualification provisions (England) Regulations 2004	Date of disqualification + 15 years	Secure disposal
1.1.11	Records relating to member or governor disqualification	Yes		Date of disqualification + 15 years	Secure disposal
1.1.12	Termination of term for members, directors/trustees or governors	Yes		Date of termination plus 6 years	Secure disposal
1.1.13	Register of Members, directors/trustees and company secretaries	Yes	Companies Act 2006	Life of the Trust plus 6 years	Stored at the Head Office of the Trust
1.1.14	Register of governors	Yes		Life of the Trust plus 6 years	Stored at the Head Office of the Trust and/or respective school of the LGC

1.1.15	Member, trustee and governor undertakings	Yes		Permanent	Stored at the Head Office of the Trust
1.1.16	Member, trustee and governor register of interests	Yes		Life of the Trust plus 6 years	Stored at the Head Office of the Trust
1.1.17	Register of gifts and hospitality	Yes		Life of the Trust + 6 years	Stored at the Head Office of the Trust
1.1.18	Member, director. Trustee and governor contact details	Yes		Date of expiry of term + 12 months (unless authority has been given to store the information for a longer period)	Secure disposal
1.1.19	Records relating to the structure and organisation of governance in the trust such as committee membership/link roles	Yes		Date of expiry of term + 6 years	Secure disposal
1.1.20	Records relating to member, director/trustee or governor training	Yes		Date of expiry of term + 6 years	Secure disposal
1.1.21	Trusts and land documents managed by the Trust	No		Permanent	Stored at the Head Office of the Trust
1.1.22	Action plans, risk registers and core offer created and administered by the Trust	No		Life of the action plan + 3 years	Secure disposal
1.1.23	Policy documents created and administered by the Trust	No		Life of the policy + 6 years	Secure disposal
1.1.24	Records relating to complaints dealt with by the Trust	Likely to contain sensitive personal data		Date of the resolution of the complaint + 6 years then further review for further retention in case of contentious disputes. (If there is an allegation of negligence retain for the current year + 15 years. If there are any safeguarding	Secure disposal

				concerns retain for the current year + 40 years)	
1.1.25	Correspondence addressed to the Trust Board and sent by the Trust Board	May contain sensitive data		Kept for up to 3 years. Documents may be retained for longer if contentious or continues to be relevant	Secure disposal
1.1.26	Records relating to member, trustee and governor DBS and S.128 checks	Yes	Keeping Children Safe in Education/ Section 128 of the Education & Skills Act 2008	The Trust does not keep copies of the DBS certificates. The certificate number is added to the single central register. Certificate number is kept permanently with date of the check and result	Stored at the Head Office of the Trust/respective school
1.1.27	Documents in connection with any legal action/threat of legal action	Likely to contain sensitive information and legally privileged information		10 years then review	Secure disposal
1.1.28	Company House documentation for example confirmation statements	Yes		7 years	Secure disposal
1.1.29	Documentation in connection with parent and staff governor elections (ballot papers)	Yes		Date of election result + 6 months	Secure disposal
1.1.30	Member, trustee and governor visits to school records	No		Date of visit + 6 years	Cross cut shredder

CEO AND CENTRAL TRUST TEAM					
	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	Minutes/notes of Central Trust Team meetings including meetings between the Central Trust Team and other internal administrative bodies or external bodies	There may be data protection issues if the minutes/notes refer to individual pupils or employees		Date of the meeting + 3 years then review	Secure disposal
1.2.2	Reports created by the CEO or members of the Central Trust Team	There may be data protection issues if the minutes/notes refer to individual pupils or employees		Date of the meeting + 3 years then review (NB if the report is referred to in a meeting the report is stored permanently with the minutes)	Secure disposal
1.2.3	Records created by the CEO and Members of the Central Trust team with administrative responsibilities	There may be data protection issues of the records refer to individual pupils or employees		Current academic year + 6 years then review	Secure disposal
1.2.4	Correspondence created by CEO and Members of the Central Trust Team with administrative responsibilities	There may be data protection issues if the correspondence refers to individual pupils or employees		Kept up to 3 years then review.	Secure disposal
1.2.5	Professional development plans	Likely to contain sensitive personal data		Life of the plan + 6 years	Secure disposal
1.2.6	Trust development plans	No		Life of the plan + 3 years	Secure disposal

1.2.7	Legal documentation and paperwork in connection with the growth of the trust	May contain legally privileged information		Date of the document plus 6 years then review	Secure disposal
1.3 Headteacher and Senior Leadership Teams/Management					
1.3.1	Minutes/notes of SLT/Management meetings including meetings with other internal administrative bodies/persons and external bodies/persons	Yes, if the minutes/notes refer to individual pupils or members of staff		School to decide how long to keep depending upon whether there are any contentious issues. If there are no contentious issues the documents will be kept up to a maximum of 3 years.	Secure disposal
1.3.2	Reports created by the Headteacher or members of the SLT/Management Team	Yes, if the report refers to individual pupils or members of staff		School to decide how long to keep depending upon whether there are any contentious issues. If there are no contentious issues the documents will be kept up to a maximum of 3 years.	Secure disposal
1.3.3	Records created by the Headteacher, SLT and/or Members of staff with administrative responsibilities	Yes, if the record refers to individual pupils or members of staff		School to decide how long to keep depending upon whether there are any contentious issues. If there are no contentious issues the documents will be kept up to a maximum of 3 years.	Secure disposal
1.3.4	Correspondence created by or received by the Headteacher, SLT and Members of staff with administrative responsibilities	There may be data protection issues of the correspondence refers to individual		School to decide how long to keep depending upon whether there are any contentious issues. If there are no contentious issues	Secure disposal

		pupils or employees		the documents will be kept up to a maximum of 3 years.	
1.3.5	School Improvement plans/ SEF's	There may be data protection issues if the record refers to individual pupils or employees		Life of the plan + 3 years	Secure disposal
1.3.6	Records relating to complaints/concerns dealt with by the school	Likely to contain sensitive personal data		Date of the resolution of the complaint + 6 years then further review for further retention in case of contentious disputes (If there is an allegation of negligence retain for the current year + 15 years. If there are any safeguarding concerns retain for the current year + 40 years)	Secure disposal
1.4 Admissions Process					
	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	All records relating to the creation and the implementation of the Trust's admissions policy	No	School Admissions Code statutory guidance for admission authorities, governing bodies, school adjudicators and admission panels December 2014	Life of the policy + 6 years then review	Secure disposal

1.4.2	Register of admissions	Yes	Regulation 7 - School Attendance (Pupil Registration) (England) Regulations 2024	6 years from the admission date then review (Schools may wish to keep the admission register permanently as often schools receive enquiries from past pupils to confirm the dates that they attended school)	Secure disposal
1.4.3	Admissions if the admission was successful	Yes		Date of admission + 1 year	Secure disposal
1.4.4	Admissions if the admission was unsuccessful	Yes		Resolution of case + 1 year	Secure disposal
1.4.5	Supplementary information form including information such as religion, medical information etc	Yes		Added to the pupil file	Secure disposal
1.5 Operational administration					
	Basic file description	Data Protection issues	Statutory provisions	Retention period (operational)	Action at the end of the administrative life of the record
1.5.1	Records relating to the creation and the publication of the Trust/schools core offer or brochure	No		Current year + 3 years	Standard disposal
1.5.2	Records relating to the creation and distribution of circulars/newsletters/information to schools, employees, families or parents	No		School to decide how long to keep but schools to review if kept longer than 2 years.	Standard disposal
1.5.3	Visitor books and signing in sheets (paper and electronic systems)	Likely to contain personal information		Current year + 6 years then review (in case of claims)	Secure disposal

1.5.4	Records relating to the creation & management of parent teacher Associations	No unless individual persons are identified.		Current year + 6 years then review	Secure disposal
1.5.6	CCTV footage	Yes		Please see the school's respective CCTV policies. The footage may be kept longer i.e for a pupil/staff disciplinary, grievance, complaint, legal investigation or possible legal claim. Footage to be deleted once the appeal time limit has expired or time limit to bring the action has expired.	Secure disposal
2.1 HUMAN RESOURCES					
	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 member of staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	Secure disposal
2.1.2	All records leading up to the appointment of a new member of staff – successful candidates	Yes		All relevant information should be transferred to the staffs' personnel file and all other information retained for 6 months	Secure disposal
2.1.3	Pre-employment vetting information – DBS checks, S.128 check social media/online checks	Yes	DBS update employer guide, Keeping Children Safe in Education	The Trust does not keep copies of the DBS certificates. The certificate number is added to the	Stored at the Head Office of the Trust or respective school

			and S.128 of the Education & Skills Act 2008	single central register. The rest of the checks are added to staffs' personnel file. Certificate number, date of check and results is kept permanently	
2.1.4	Proof of identity collected as part of enhanced DBS disclosure			A permanent note should be kept of what was seen and checked. If it is felt necessary to keep copy documentation this should be placed on the staff's personnel file.	
2.1.5	Pre-employment vetting information – Evidence proving the right to work in the UK	Yes	An employer's guide to right to work checks	Where possible these should be kept in the staff personnel file but if they are kept separately the Home office requires these documents to be kept for the duration of the employment + at least 2 years	Secure disposal
2.1.6	Staff safeguarding training register, signed staff code of conduct forms and register of adhering to KCSIE	Yes	KCSIE	Where possible they should be kept on the individual personnel files. If training is related to safeguarding or children retain for date of training + 40 years (as may be needed in cases of investigation)	Secure disposal
2.1.7	Records relating to a TUPE process			Date last member leaves employment + 6 years	Secure disposal

2.2 OPERATIONAL STAFF MANAGEMENT					
	Basic file description	Data Protection issues	Statutory provisions	Retention period (operational)	Action at the end of the administrative life of the record
2.2.1	Staff personnel file	Yes	Limitation Act 1980	Termination of employment + 6 years then review (keep longer if contentious/disciplinary issues)	Secure disposal
2.2.2	Job descriptions	Yes	Berkshire Pensions have asked us to keep job descriptions to enable ill-health determinations to be made (active and deferred service) which can arise many years after the scheme member has ceased employment.	Staff member's date of birth + 100 years	Secure disposal
2.2.3	Timesheets	Yes		Current year + 6 years	Secure disposal
2.2.4	Annual appraisal records	Yes		Current year + 6 years	Secure disposal
2.2.5	Whole school and individual CPD records/plans	Yes, if individuals are named		Life of the plan + 6 years	Secure disposal

2.3 MANAGEMENT OF DISCIPLINARY, CAPABILITY, SICKNESS & GRIEVANCE PROCESSES					
	Basic file description	Data Protection issues	Statutory provisions	Retention period (operational)	Action at the end of the administrative life of the record
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 and working together to safeguard children A guide to inter agency working to safeguard and promote the welfare of children	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 must be removed from personnel files. If the allegations are founded, they are to be kept on file and a copy provided to the person concerned.	Secure disposal
2.3.2	Disciplinary proceedings				
	First warning	Yes		Placed on personnel file	Secure disposal
	Written warning	Yes		Placed on personnel file	Secure disposal
	Final warning	Yes		Placed on personnel file	Secure disposal
	Case not found			If the incident is child protection related, then see above. If not dispose at the conclusion of the case	Secure disposal
	Dismissal (where there are no child protection issues)	Yes	Limitation Act 1980	Date of dismissal + 6 years	Secure disposal
2.3.3	Grievance – not upheld	Yes		At the conclusion of the matter including any appeal time limit	Secure disposal

2.3.4	Grievance - upheld	Yes		Date leaves employment + 6 years	Secure disposal
2.3.5	Sickness and absence records	Yes		Date leaves employment + 6 years	Secure disposal
2.3.6	Capability	Yes		Added to personnel file	Secure disposal
2.4 HEALTH & SAFETY					
	Basic file description	Data Protection issues	Statutory provisions	Retention period (operational)	Action at the end of the administrative life of the record
2.4.1	Health and safety policy	No		Life of policy + 18 years	Secure disposal
2.4.2	Health and safety risk assessments	No		Life of the risk assessment + 18 years	Secure disposal
2.4.3	Records relating to an accident/accident reporting/Accident log	Yes	Social Security Regulations 1979 regulation 25. Social Security administrative Act 1992 Section 8. Limitation Act 1980	Date of incident + 7 years (for a person over 18 at the time of the accident/incident) For a child - date of birth of the child + 25 years	Secure disposal
2.4.4	Control of substances hazardous to health	No	Control of Asbestos at work Regulation 2012 SI 1012 no 632 Regulation 19	Current year +40 years	Secure disposal
2.4.5	Process of monitoring of areas where employees and persons are likely to have come into contact with asbestos	No	The control of substances Hazardous to Health Regulations 2002	Last action + 40 years	Secure disposal
2.4.6	Process of monitoring of areas where employees and persons are likely to have come into contact with radiation	No	The control of substances Hazardous to	Last action +50 years	Secure disposal

			Health Regulations 2002		
2.4.7	Fire precautions logbooks and fire assessments	No	The Regulatory Reform (Fire Safety) Order 2005	Current year + 6 years	Secure disposal
2.4.8	Training logs for staff	No		Current year + 6 years then review (records to be kept longer if the training was in relation to asbestos or substances hazardous to health)	
2.4.9	Accessibility plans	No	Limitation Act 1980	Life of the plan + 6 years	Cross cut shredder
2.4.10	Health records of staff (where they are not needed for one of the reasons in this section)	Yes		Whilst the employee is employed	Secure disposal
2.5 Payroll and Pensions					
2.5.1	Maternity, paternity, adoption, shared parental leave pay records	Yes	Statutory maternity pays (General) Regulations 1986	Current year + 3 years	Cross cut shredder
2.5.2	Holiday pay	Yes	Employment Rights Act 2025/ Fair Work Agency	Current year + 6 years	Secure disposal
2.5.2	Records held under retirement benefits Schemes Regulations 1995	Yes		Current year + 6 years	Cross cut shredder
2.5.3	Payroll records	Yes	PAYE and payroll for employers: Keeping Records Berkshire Pension Fund can request salary information for members up to 13 years before	13 years + current tax year	Secure disposal

			ceasing pensionable service		
2.5.4	Working hours	Yes	Berkshire Pensions have requested information relating to staff's working hours for those 1.4.2014 + final salary scheme as queries may arise many years later.	6 + years after the period worked except for members you have pre- 1.4.2014 pensionable service and entitled to final salary benefits in which case the data is held for 15 years + the date of the last pension payment	Secure disposal
2.5.5	Pension records	Yes	To answer questions and to respond to complaints	Greater period of either Last payment + 15 years or (on the basis this is the maximum statutory time limit, and any complaints need to be brought within that time frame) or 100 years from the scheme member's date of birth (suggested period in ICO retention policy and guidelines of National Archives or 100 years from the date of birth of any beneficiary who after the scheme members' death, received any benefits	Secure disposal

3 Financial Management					
3.1 Risk Management and Insurance					
3.1.1	Employers' liability insurance certificate	No		Closure of the school + 40 years	Cross cut shredder
3.2 Asset Management					
3.2.1	Inventories of furniture, IT equipment and other assets	No		Current year + 6 years	Cross cut shredder
3.2.2	Burglary, theft and vandalism report forms	No		Current year + 6 years	Cross cut shredder
3.3 Accounts and statement including Budget Management					
3.3.1	Annual report and accounts	No	Companies Act 2006 S.355	Current year + 10 years	Standard disposal
3.3.2	Loans and grants managed by the Trust	No		Date of last payment on the loan + 12 years then review	Cross cut shredder
3.3.3	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	Cross cut shredder
3.3.4	Invoices, receipts, order books, requisitions, delivery notices/confirmation of delivery, purchase orders	No		Current year + 6 years	Cross cut shredder
3.3.5	Records relating to the collection and banking of monies	No		Current year + 6 years	Cross cut shredder
3.3.6	Records relating to the identification and collection of debt	No		Current year + 6 years	Cross cut shredder
3.3.7	Bank account ledgers and statements			Current year + 6 years	Cross cut shredder
3.3.8	VAT records	No	Record keeping (VAT notice 700/21)	Current year + 6 years	Secure disposal
3.3.9	Records relating to the appointment of auditors and Auditor reports	No		Current year + 6 years	Secure disposal

3.3.10	All records relating to tender processes	No unless individuals are named		Date of tender completion + 1 year for unsuccessful bidders Date of tender + 6 years for successful bidder	Secure disposal
3.3.11	Appointment of Responsible Officers	Yes		Life of the Academy	Secure disposal
3.3.12	Funding records (capital grant, GAG, PPG, etc)	No unless individuals are named		Date of last payment + 6 years	Secure disposal
3.3.13	Records relating to Gift Aid/tax relief	No unless individuals are named		Date of last payment + 6 years	Secure disposal
3.4 Contract Management					
3.4.1	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	Cross cut shredder
3.4.2	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	Cross cut shredder
3.4.3	Records relating to the maintenance of contracts	No		Current year + 2 years	Cross cut shredder
3.4.4	Commercial transfer agreements	No		Life of document + 6 years	Cross cut shredder
4.1 Property Management					
4.1.1	Title deeds of properties belonging to the school	No		Permanent	
4.1.2	Plans of property belonging to the school	No		Retained whilst the building belongs or are leased to the school	
4.1.3	Leases of property including Church supplemental agreements	No		Expiry of the lease/agreement + 6 years	Cross cut shredder
4.1.4	Records relating to the letting of Trust premises	No		Current year + 6 years	Cross cut shredder

4.1.5	Tenancy agreements	May contain sensitive information		Expiry of the tenancy agreement + 6 years	Secure disposal
4.1.6	Documentation relating to school vehicles	No	Limitation Act 1980	6 years from the disposal of the vehicle	Secure disposal
4.2 Maintenance					
4.2.1	All records relating to the maintenance of the Trust estates carried out by contractors	No		Current year + 6 years	Cross cut shredder
4.2.2	All records relating to the maintenance of the school carried out by Trust employees including maintenance logbooks	No		Current year + 6 years	Cross cut shredder
5. Central Government & local authority					
5.1 Central Government					
5.1.1	OFSTED reports and papers	No		Life of the report then review	Cross cut shredder
5.1.2	Returns made to Central Government	No		Current year + 6 years	Cross cut shredder
5.1.3	Circulars and other information sent from Central Government	No		Operational use	Cross cut shredder
5.1.4	School census returns	No		Current year + 5 years	Cross cut shredder
5.2 Local Government					
5.2.1	Secondary transfer sheets (Primary)	Yes		Current year + 2 years	Secure disposal
5.2.2	Attendance returns	Yes		Current year + 1 year	Secure disposal
5.2.3	Circulars and other information sent from the Local Authority	No		When no longer required/operational	Cross cut shredder
6. School meals management					
6.1	Free school meals register	Yes		Current year + 6 years	Secure disposal
6.2	School meal registers (financial records only)	Yes		Current year + 3 years	Secure disposal

6.3	Biometric information to pay for school lunches	Yes		As soon as the pupil leaves school or withdraws consent	Secure disposal
7. Pupil management					
7.1 Pupils Educational Record					
7.1.1	Pupil's educational record (whilst at primary school) including a record of suspensions and exclusions, records of restrictive interventions and seclusion	Yes	The Education (Pupil information) (England) Regulations 2005 - Academies are advised to follow as good practice	Retain whilst the child remains at the primary school	The file should follow the pupil when he/she leaves the primary school via school2school (S2S) or another secure method. If the pupil dies, transfers to an independent school, leaves the country or becomes home schooled whilst at primary school the file should be sent to the Local Authority to be retained for the statutory retention period.
7.1.2	Pupil's educational record (whilst at secondary school) including a record of suspensions and exclusions, records of restrictive interventions and seclusions	Yes	The Education (Pupil information) (England) Regulations 2005 Academies are advised to follow as	To be kept until the child's 25 th birthday unless the child transfers to another school before the end of Year 11 then the file is transferred to the new school	

			good practice. Limitation Act 1980		
7.1.3	Examination results – pupil copies	Yes		School to decide but no more than 12 months. A record of any destroyed certificates should be kept for 4 years.	All uncollected certificates should either be returned to the Examination Board or destroyed after 12 months.
7.1.4	Examination results – internal copies	Yes			Placed on pupil’s educational record
7.1.5	Child protection information held on pupil file/CPOMS	Yes	Keeping Children Safe in Education and The Report of the Independent Inquiry into child sexual abuse	For child protection information – child’s 25 th birthday For any information relating to child sexual abuse - child’s 75 th birthday	Secure disposal or transferred via S2S/secure method (separately sent from the main pupil record) if the pupil moves school before the end of Year 11
7.2 Attendance					
7.2.1	Attendance registers	Yes	School Attendance (Pupil Registration) (England) Regulations 2024	Date of entry + 6 years	Secure disposal
7.2.2	Correspondence/documentation relating to requests for absence		Education Act 1996 Section 7	Current year + 2 years	Secure disposal
7.3 Special Educational Needs and Disabilities					
7.3.1	Documents in connection with assessment of needs, reviews, individual education plans etc	Yes	Limitation Act 1980 Section 2	Child’s date of birth plus 25 years then review. Keep longer if the provision was considered contentious. NOTE: This retention period is the minimum retention	Secure disposal

				period that any pupil file should be kept. Some schools may choose to keep SEN files for a longer period of time to defend themselves in a “failure to provide a sufficient education” case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented.	
7.3.2	EHCP and associated documentation		Limitation Act 1980 Section 2	Child’s date of birth plus 25 years then review. Keep longer if the provision was considered contentious	Secure disposal
7.3.3	Advice and information provided to parents/carers/pupils regarding educational needs		Limitation Act 1980 Section 2	Child’s date of birth plus 25 years then review. Keep longer if the provision was considered contentious	Secure disposal
8. Curriculum management					
8.1 Statistics and management information					
8.1.1	Curriculum plans	No		Operational – schools to decide but usually 3 years is considered appropriate	Cross cut shredder
8.1.2	Examination results (schools copy)	Yes		Current year + 6 years	Cross cut shredder
8.1.3	SATS records, phonics check, multiplication check and similar administered tests	Yes		Current year + 6 years (school copy) Pupil copy placed on pupil record and retained until the pupil turns 25 years of age	Secure disposal

8.1.4	Examination papers	No		Current year + 6 years	Cross cut shredder
8.1.5	Value added and contextual data	Yes		Current year + 6 years	Secure disposal
8.1.6	Self-evaluation forms	May contain sensitive information		Up to current year + 6 years	Secure disposal
8.1.7	Internal reports on curriculum or departments	May contain sensitive information		Operational – schools to decide depending upon the context	Secure disposal
8.2 Implementation of the curriculum					
8.2.1	Schemes of work, timetable, mark books, record of homework set, curriculum maps	No		Current year/period + 1 year then review	Cross cut shredder
8.2.2	Pupils' work	No		Where possible pupil's work should be returned to the pupil at the end of the academic year. If this is not the school's policy, then it should be retained for the current year + 1 year. NOTE: This retention period is the minimum retention period that any pupil file should be kept. Some schools may choose to keep pupils with SEN files for a longer period of time to defend themselves in a "failure to provide a sufficient education" case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum	Cross cut shredder

				retention period and this should be documented.	
9. Co- curricular activities					
9.1	Records created by schools to obtain approval to run an educational visit outside the classroom - (Primary Schools)	No		Date of visit + 14 years	Cross cut shredder
9.2	Records created by schools to obtain approval to run an educational visit outside the classroom - (Secondary Schools)	No		Date of visit + 10 years	Cross cut shredder
9.3	Parental consent forms and records of the visit for trips where there has been a serious incident or personal injury	Yes	Limitation Act 1980	Date of birth of the pupil involved in the incident + 25 years (permission slips for all pupils need to be retained to demonstrate the rules had been followed for all pupils)	Secure disposal
9.4	Records of educational visits plus the parental consent forms (where there has been no incident)			Date of visit + a maximum of 1 years	Secure disposal
10. Oxford Diocese					
10.1	SIAMS reports & papers	No		Life of the report then review	Cross cut shredder
10.2	Circulars and other information sent from the Oxford Diocese	No		Operational use -staff discretion to dispose of the information when it is no longer required	Cross cut shredder