

## DEPARTMENT FOR EDUCATION – INCLUSION AND EARLY INTERVENTION

### Retention Schedule

January 2018

Under the Public Records (Jersey) Law 2002 the Archivist appointed by Jersey Heritage is required to work with public authorities to produce retention schedules. The schedules list the public records produced by authorities, the length of time these records need to be retained for and the eventual disposal of the information – either to the Jersey Archive for permanent preservation or to be confidentially destroyed.

This schedule applies to all records, whether paper or electronic that are produced by Inclusion and Early Intervention, Education Department.

The guidance below reflects best practice but does not constitute legal advice. The Archivist will endeavour to work with public authorities to ensure that the guidance reflects legislation but responsibility for checking on any legislative requirements rests with the public authority. Responsibility for checking more recent enactments rests with the reader.

This schedule will be reviewed after 5 years. Date of next review: 2023

File Title	Retention at Education	Action by Education	Action by Jersey Archive	Notes
<b>Overview Records</b>				
Meeting minutes, agendas and reports e.g. IEI Manager meetings	Current plus 3 years	Transfer minutes etc. of high-level/policy meetings to Jersey Archive  Destroy low level meeting minutes/action points	Archive	
Correspondence including email and working papers	Retain until no longer required	Transfer relevant emails to project/subject folders and delete low-level emails	Archive relevant project/subject folders	See Email Guidelines document
Policies, Procedures and Form Templates	Until superseded	Transfer copy of each and any significant updates to Jersey Archive	Archive	
Jersey specific guidelines and reference information	Retain until no longer required	Transfer copy of each to Jersey Archive	Archive	
Non-Jersey specific guidelines and reference information	Until superseded	Destroy		

Surveys and Questionnaires e.g. Service Evaluations	Current plus 3 years	Transfer one copy and summary of results on production to Jersey Archive	Archive	
Training Course Packs	Current plus 3 years	Transfer a sample to Jersey Archive	Archive the sample	
Administrative Training Documents	Current plus 3 years	Destroy	None	
UK Publications	Until superseded	Destroy	None	
Enquiries, Complaints & Responses	Current plus 3 years	Transfer to Jersey Archive those of high public-interest and those which lead to the making of, or changes in policy	Archive	
<b>Student Records</b>				
Individual Student Files (Inclusion and Early Intervention)	Date of Birth plus 25 years	Transfer a small sample to Jersey Archive; those of high public-interest, or high profile cases and those which lead to the making of, or changes in policy	Archive the sample	
Records of School Counsellors	Until counselling finished	Add to Individual Student Record	None	
<b>Finance Records – Refer to Financial Directions</b>				
<b>Personnel Records – Refer to Generic SoJ HR Retention Schedule</b>				
<b>Health and Safety - Refer to Generic SoJ Health and Safety Retention Schedule</b>				

**APPROVED AND SIGNED BY EDUCATION – INCLUSION AND EARLY INTERVENTION:**

Name	Signature	Position	Date

**APPROVED AND SIGNED BY JERSEY ARCHIVE:**

Name	Signature	Position	Date
Linda Romeril		Archives and Collections Director, Jersey Heritage	