

**DEPARTMENT FOR EDUCATION
(IN ASSOCIATION WITH THE JERSEY HERITAGE TRUST)**

GUIDELINES

**RETENTION SCHEDULES FOR PRIMARY SCHOOL RECORDS
(whether the format is paper or electronic)**

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.

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.

Records in Series		Retention in school	Action by school	Action by Jersey Archive	Notes
1.	MANAGEMENT				
1.1	Minutes and reports of management Team meetings	Current + 3 years	Transfer to Jersey Archive	Permanent retention	
1.2	Professional development plans	Current + 3 years	Transfer to Jersey Archive	Permanent retention	
1.3	School development plans	Current + 3 years	Transfer to Jersey Archive	Permanent retention	
1.4	Headteacher's personal filing	Current + 6 years	Review: selected items to Jersey Archive	*Review	Files should automatically be reviewed When Headteacher leaves
1.5	Deputy Head's filing	Current + 6 years	Review: selected items to Jersey Archive	*Review	Files should automatically be reviewed when Deputy Headteacher leaves

1.6	School policies	Retain until superseded	Transfer to Jersey Archive new policies or significantly updated ones	Permanent retention	
2.	SCHOOL ORGANISATION				
2.1	School log books /diaries	Current + 1 year	Transfer to Jersey Archive	Permanent retention	
2.2	School prospectus	Current + 1 year	Transfer to Jersey Archive	Permanent retention	
2.3	Headteacher's official diary	Current + 1 year	Destroy		Based on the assumption that it is a record of engagements
2.4	Staff meetings Minutes	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
2.5	Administration and general files	Current + 6 years	Transfer to Jersey Archive	*Review	
2.6	Annual calendar of events	Current	*Review: selected items to Jersey Archive	Permanent retention	
2.7	Circulars to staff and pupils	Current + 2 years			Sample to Archive
2.8	Newsletters to parents	Current + 3 years	Transfer to Jersey Archive	Permanent retention	The school 'master set' should be retained permanently
2.9	Staff Handbook	Current	Transfer to Jersey Archive	Permanent retention	
2.10	Visitors Book (VIP visitors)	Current + 3 years	Transfer to Jersey Archive	Permanent retention	
3.	HEALTH AND SAFETY				
3.1	Health and Safety Policy statement	Current + 1 year	Destroy		
3.2	Staff Accident Records	Current + 6 years	Destroy		
3.3	Pupil Accident Records	DOB + 25 years	Destroy		
3.4	Incident report book	Current + 20 years	Destroy		
3.5	Maintenance log book	Current + 10 years	Destroy		
3.6	Training records	Current + 10 years	Destroy		
3.7	Health and Safety Reports	Current + 10 years	Destroy		
3.8	Fire precautions log book	Current + 6	Destroy		

		years			
4.	CHILD PROTECTION				
4.1	Child protection files	10 years post incident	Managerial Review		
4.2	Allegation of a child protection nature against a member of staff, including where the allegation is unfounded	Until the person's normal retirement age or 10 years from the date of the allegation, whichever is longer	Destroy		
5.	PUPILS				
5.1	Admission Registers (CMIS system)	While current and active	Transfer to Jersey Archive	Permanent retention	Admission registers are current while entries are being made and active until the pupil has left the school
5.2	Attendance Registers	Current + 3 years	Destroy		
5.3	Pupil record cards (CMIS)	Current			Transfer to secondary school
5.4	Pupil's educational record/ file (CMIS)	DOB + 25 years	Destroy		
5.5	Punishment books	Current + 3 years		Keep	Transfer to Archive
5.6	Absence books	Current + 6 years	Destroy		
5.7	Absence letters	Current + 2 years	Destroy		
6.	STAFF				
6.1	Staff personal files	Retain in line with retention schedules for PFs produced by HR			

6.2	Child Protection Files – any personnel files with allegations	100 years from end date of file	Review – Transfer significant high profiles cases to Jersey Archive	Archive	
7.	TEACHING AND THE CURRICULUM				
7.1	Curriculum development minutes and files; Professional Development plan	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
7.2	School syllabus	Current	Transfer to Jersey Archive	Permanent retention	
7.3	Timetables	Current	Sample to Jersey Archive	Sample for permanent retention	
7.4	Mark Books	Current	Destroy		
7.5	Record of homework set	Current	Destroy		
7.6	Teaching Aids (commercial and home-made)	Current	Small sample to Jersey Archive	Small sample retained	
7.7	Pupil's work	Current	sample to Jersey Archive	Small sample retained	
7.8	Examination results – held at DfESC	Current + 6 years	Destroy		
8.	FINANCE – the following are in addition to SoJ Financial Direction No 12.7				
8.1	Annual Budget	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
8.2	Budget files	Current + 6 years	Destroy		
8.3	Headteacher's budget reports and budget monitoring tabulations	Current + 1 year	Destroy		
8.4	Annual statement of accounts	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
8.5	Order books and requisitions	Current + 6 years	Destroy		
8.6	Delivery documentation	Current + 6 years	Destroy		
8.7	Invoices, bank account records, cashbooks, cash till rolls, debtor's records	Current + 6 years	Destroy		
9.	PROPERTY (in consultation with Property Holdings)				

9.1	Legal agreements, leases, maintenance contracts	Current + 6 years	Destroy		
9.2	Contracts/Title Deed	Current	Transfer to Jersey Archive	Permanent retention	
9.3	Register of tenders and quotations, orders for repairs, maintenance and supplies, records of letting school premises, maintenance log books, burglary, theft and vandalism report forms, contractor's reports	Current + 10 years	Destroy		
9.4	Records of insurance (policies and schedules)	Current	Destroy		
9.5	Inventories of furniture and equipment	Current	Destroy	Detailed or old inventories may be considered for permanent retention.	
9.6	Plans	Keep while in regular use	Transfer to Jersey Archive	Permanent retention	
10.	EXTRA-CURRICULAR AND MISCELLANEOUS ACTIVITIES				
10.1	School magazines	One reference set at school	Transfer annually to Jersey Archive	Permanent retention	
10.2	Scrapbooks of news cuttings etc	Current + 1 year	Transfer to Jersey Archive	Permanent retention	
10.3	Photographs	Current	Transfer sample to Jersey Archive	Permanent retention	
10.4	Programmes – concerts, plays, sports day, lists of school prize winners etc	Reference copies at school	Transfer annually to Jersey Archive	Permanent retention	
10.5	School History	Reference copy at school	Transfer one copy to Jersey Archive	Permanent retention	One copy also to Jersey Library Ref. Section
10.6	Audio-tape, video-tape recordings	Current	Transfer to Jersey Archive	Permanent retention	
10.7	Record of school societies	Current	Sample to Jersey Archive	Permanent retention	Minutes/ newsletters should be identified and preserved as far as possible

11. OLD PUPIL'S ASSOCIATIONS					
11.1	Secretary: Minute Books	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
11.2	Secretary: Correspondence	Current + 6 years	Review		
11.3	Secretary: Publications (newsletters, bulletins, menus for formal dinners, sporting fixtures etc)	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
11.4	Secretary/ Treasurer: Membership list	Current			
11.5	Treasurer: Annual accounts	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
11.6	Treasurer: Account book	Current + 10 years	Transfer to Jersey Archive	Review	
11.7	Treasurer: Other accounts	Current + 10 years	Destroy		
12. PARENT-TEACHER ORGANISATIONS					
12.1	Minutes	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
12.2	Account Book	Current + 10 years	Review		
12.3	Annual statement of accounts	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
12.4	Supporting financial papers	Current + 10 years	Destroy		
12.5	Files	Current + 6 years	Review, transfer to Jersey Archive	*Review	

**Review of documents should always be undertaken in conjunction with the States Archivist*

OTHER DOCUMENTS IN USE

Type of Record	Length of Retention in School	Subsequent Action by School	Comments
