

## DEPARTMENT FOR EDUCATION – RESOURCES AND SCHOOL SUPPORT

### Retention Schedule

**April 2016**

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 Policy and Planning, 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: 2021

File Title	Retention at Education	Action by Education	Action by Jersey Archive	Notes
<b>Overview Records</b>				
Correspondence	Retain until no longer required	Transfer relevant emails to project/subject folders and delete low-level emails	Archive relevant project/subject folders	
Year End Accounts File	Current plus 5 years	Transfer to Jersey Archive	Archive	
Financial Reports & Reviews (e.g.) Fundamental Spending Review	Current plus 5 years	Transfer to Jersey Archive	Archive	
Working Papers for Reports & Reviews	Current plus 5 years	Transfer to Jersey Archive	Review: archive selected items	
Working Papers for Budgets & Accounts	Current plus 5 years	Transfer to Jersey Archive	Review: archive selected items	
Budget and Budget Working Papers	Current plus 5 years	Transfer to Jersey Archive	Archive	
Treasury Reports – ESC Finance specific	Current plus 5 years	Transfer to Jersey Archive	Archive	
Reform Legislation – Reports & Minutes	Current plus 5 years	Transfer to Jersey Archive	Archive	

Complaints	Current plus 5 years	Transfer high profile complaints with public interest to Jersey Archive	Archive	
Statistics	Current plus 5 years	Transfer to Jersey Archive	Archive	
Final Accounts/Grants to/from 3 <sup>rd</sup> Party Bodies	Current plus 5 years	Transfer to Jersey Archive	Archive	
<b>Staff – Refer to States of Jersey HR retention schedule</b>				
<b>Schools</b>				
School Fees in Dispute	Current plus 5 years	Transfer to Jersey Archive	Archive	
Private School Index Linking	Current plus 5 years	Transfer to Jersey Archive	Archive	
Age Weighted Pupil Units	Current plus 5 years	Transfer to Jersey Archive	Archive	
Treasury Reports – Education Finance specific	Current plus 5 years	Transfer to Jersey Archive	Archive	
School Budgets	Current plus 5 years	Transfer to Jersey Archive	Archive	May not retained if budget received by archive from school
<b>Capital Programme</b>				
Capital Programmes	Current plus 6 years	Destroy	None	Received by JA from Property Holdings
Capital Updates	Current plus 6 years	Destroy	None	Received by JA from Property Holdings
<b>Data Protection</b>				
Data Protection Laws and Information	Current plus 6 years	Destroy	None	
Subject access requests	Current plus 6 years	Destroy	None	
Data Protection Complaints	Current plus 6 years	Destroy	None	
Meeting Notes	Current plus 6 years	Destroy	None	
Training	Current plus 6 years	Destroy	None	
Adults Background Information Files (e.g.) Data Protection	Current plus 25 years	Review		
Children Background Information Files (e.g.) Data Protection	Current plus 25 years	Review		
<b>Health and Safety</b>				

All documents including accident reports	Please refer to Generic H&S retention schedule		None	
Health and Safety Insurance Claims	Please refer to Generic H&S retention schedule		None	
<b>Insurance</b>				
All documents	Current plus 25 years	Destroy	None	
<b>Legislative</b>				
Copyright agreements	Until superseded plus 6 years	Destroy	None	
Education draft laws and responses to draft laws	Current plus 3 years	Review	Review: archive selected documents	
<b>Public Accounts Committee</b>				
Agendas and Minutes	Current plus 3 years	Destroy	None	Transfer from States Greffe
Reports	Current plus 3 years	Destroy	None	Transfer from States Greffe
<b>Information and Communication Technologies</b>				
Reports	Current plus 3 years	Transfer to Jersey Archive	Archive	
Policies	Current plus 3 years	Transfer to Jersey Archive	Archive	
Strategies	Current plus 3 years	Transfer to Jersey Archive	Archive	
Projects	Current plus 3 years	Transfer to Jersey Archive	Review: archive selected documents	
Statistics and analysis	Current plus 3 years	Transfer to Jersey Archive	Archive	
<b>Administration &amp; Maintenance – Refer to States of Jersey generic maintenance schedule</b>				

**APPROVED AND SIGNED BY EDUCATION – RESOURCES & SCHOOL SUPPORT:**

Name	Signature	Position	Date

**APPROVED AND SIGNED BY JERSEY ARCHIVE:**

Name	Signature	Position	Date

Linda Romeril		Archives and Collections Director, Jersey Heritage	
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