

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

GUIDELINES

RETENTION SCHEDULES FOR SECONDARY SCHOOL RECORDS  
(whether the format e.g: paper or electronic)

Records in Series		Retention in school	Action by school	Action by Jersey Archive	Notes
	1.	<b>MANAGEMENT</b>			
	1.1	<b>Minutes and reports of management team meetings</b>	<b>Current + 3 years</b>	<b>Transfer to Jersey Archive</b>	<b>Permanent retention</b>
	1.2	<b>Professional development plans</b>	<b>Current + 3 years</b>	<b>Transfer to Jersey Archive</b>	<b>Permanent retention</b>
	1.3	<b>School development plans</b>	<b>Current + 3 years</b>	<b>Transfer to Jersey Archive</b>	<b>Permanent retention</b>
	1.4	<b>Headteacher's personal filing</b>	<b>Current + 6 years</b>	<b>Review: selected items to Jersey Archive</b>	<b>*Review</b> <b>Files should automatically be reviewed when Headteacher leaves</b>
	1.5	<b>Deputy Head's filing</b>	<b>Current + 6 years</b>	<b>Review: selected items to Jersey Archive</b>	<b>*Review</b> <b>Files should automatically be reviewed when Deputy Headteacher leaves</b>
	1.6	<b>School policies</b>	<b>Retain until superseded</b>	<b>Transfer to Jersey Archive new policies or significantly updated ones</b>	<b>Permanent retention</b>
	2.	<b>GOVERNING BODIES</b>			
	2.1	<b>Instruments and Articles of Government</b>		<b>Transfer one copy to Jersey Archive</b>	<b>Permanent retention</b>
	2.2	<b>Governor's Minutes,</b>	<b>Current + 6</b>	<b>Transfer to</b>	<b>Permanent</b>

		agendas and papers	years	Jersey Archive	retention		
	2.3A	Proceedings: reports from DfESC	Retain while current	Destroy			
	2.3B	Papers from school staff	Current + 6 years	Transfer to Jersey Archive	Permanent retention		
	2.4	Proceedings of the PTA AGM	Current + 3 years	Transfer to Jersey Archive	Permanent retention		
	2.5	Correspondence files	Current + 6 years	Review: selected items to Jersey Archive	*Review		
	3.	SCHOOL ORGANISATION					
	3.1	School prospectus	Current + 1 year	Transfer to Jersey Archive	Permanent retention		
	3.2	Headteacher's official diary	Current + 1 year	Destroy		Based on the assumption that it is a record of engagements	
	3.3	Staff meetings Minutes	Current + 6 years	Transfer to Jersey Archive	Permanent retention		
	3.4	Administration and general files	Current + 6 years	Transfer to Jersey Archive	*Review		
	3.5	Annual calendar of events	Current	*Review, selected items to Jersey Archive	Permanent retention		
	3.6	Circulars to staff and pupils	Current + 2 years			Sample to Archive	
	3.7	Newsletters to parents	Current + 3 years	Transfer to Jersey Archive	Permanent retention	The school 'master set' should be retained permanently	
	3.8	Staff Handbook	Current	Transfer to Jersey Archive	Permanent retention		
	3.9	Visitors Book (VIP visitors)	Current + 3 years	Transfer to Jersey Archive	Permanent retention		

	4.	HEALTH AND SAFETY				
	4.1	Health and Safety Policy statement	Current + 1 year	Destroy		
	4.2	Staff Accident Records	Current + 6 years	Destroy		
	4.3	Pupil Accident Records	DOB + 25	Destroy		
	4.4	Safety incident report book	Current + 20 years	Destroy		
	4.5	Maintenance log book	Current + 10 years	Destroy		
	4.6	Training records	Current + 10 years	Destroy		
	4.7	Health and Safety Reports	Current + 10 years	Destroy		
	4.8	Fire precautions log book	Current + 6 years	Destroy		
	5.	CHILD PROTECTION				
	5.1	Child protection files	10 years post incident	Managerial Review		
	6.	PUPILS				
	6.1	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
	6.2	Attendance Registers	Current + 3 years	Destroy		
	6.3	Pupil's educational record/ file (CMIS)	DOB + 25 years	Destroy		
	6.4	Punishment books	Current + 3 years		Retain	Transfer to Archive
	6.5	Absence books	Current + 6 years	Destroy		
	6.6	Absence letters	Current + 2 years	Destroy		
	7.	STAFF				

	7.1	Staff personal files	Retain in line with retention schedules for PFs produced by HR			
	7.2	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	
	8.	TEACHING AND THE CURRICULUM				
	8.1	Curriculum development Minutes and files; Professional Development plan	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
	8.2	School syllabus	Current	Transfer to Jersey Archive	Permanent retention	
	8.3	Timetables	Current	Sample to Jersey Archive	Sample for permanent retention	
	8.4	Record of homework set	Current	Destroy		
	8.5	Teaching Aids (commercial and home-made)	Current	Small sample to Jersey Archive	Small sample retained	
	8.6	Examination results – held at DfESC	Current + 6 years	Destroy		
	8.7	Pupils' work	Current	Small sample to Jersey Archive	Small sample retained	
	9.	FINANCE – the following are in addition to SoJ Financial Direction No 12.7				
	9.1	Annual Budget (Department only)	Current + 6 years	Transfer to Jersey Archive	Permanent retention	
	9.2	Budget files	Current + 6 years	Destroy		
	9.3	Headteacher's budget reports and budget monitoring tabulations	Current + 1 year	Destroy		

	9.4	Annual statement of accounts	Current + 6 years	Transfer to Jersey Archive	Permanent retention		
	9.5	Order books and requisitions	Current + 6 years	Destroy			
	9.6	Delivery documentation	Current + 6 years	Destroy			
	9.7	Invoices, bank account records, cashbooks, cash till rolls, debtor's records	Current + 6 years	Destroy			
	10.	PROPERTY (In consultation with Property Holdings)					
	10.1	Legal agreements, leases, maintenance contracts	Current + 6 years	Destroy			
	10.2	Contracts/Title Deed	Current	Transfer to Jersey Archive	Permanent retention		
	10.3	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, contractors' reports	Current + 10 years	Destroy			
	10.4	Records of insurance (policies and schedules)	Current	Destroy			
	10.5	Inventories of furniture and equipment	Current	Destroy	Detailed or old inventories may be considered for permanent retention		
	10.6	Plans	Keep while in regular use	Transfer to Jersey Archive	Permanent retention		
	11.	CAREERS ADVICE					
	11.1	Correspondence files	Current + 6 years	Destroy			
	11.2	Information files	Current	Destroy			
	12.	EXTRA-CURRICULAR AND MISCELLANEOUS ACTIVITIES					

	12.1	School magazines	One reference set at school	Transfer annually to Jersey Archive	Permanent retention		
	12.2	Scrapbooks of news cuttings etc	Current + 1 year	Transfer to Jersey Archive	Permanent retention		
	12.3	Photographs	Current	Transfer sample to Jersey Archive	Permanent retention		
	12.4	Programmes – concerts, plays, sports day, lists of school prize winners etc	Reference copies at school	Transfer annually to Jersey Archive	Permanent retention		
	12.5	School History	Reference copy at school	Transfer one copy to Jersey Archive	Permanent retention	One copy also to Jersey Library Ref. Section	
	12.6	Audio-tape, video-tape recordings	Current	Transfer to Jersey Archive	Permanent retention		
	12.7	Record of school societies	Current	Sample to Jersey Archive	Permanent retention	Minutes/ newsletters should be identified and preserved as far as possible	
	13.	OLD PUPIL'S ASSOCIATIONS					
	13.1	Secretary: Minute Books	Current + 6 years	Transfer to Jersey Archive	Permanent retention		
	13.2	Secretary: Correspondence	Current + 6 years	Review			
	13.3	Secretary: Publications (newsletters, bulletins, menus for formal dinners, sporting fixtures etc)	Current + 6 years	Transfer to Jersey Archive	Permanent retention		
	13.4	Secretary/ Treasurer: Membership list	Current				
	13.5	Treasurer: Annual accounts	Current + 6 years	Transfer to Jersey Archive	Permanent retention		
	13.6	Treasurer: Account book	Current + 10 years	Transfer to Jersey Archive	*Review		

