

DEPARTMENT FOR EDUCATION – SKILLS JERSEY

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 Skills Jersey.

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 Skills Jersey | Action by Skills Jersey | Action by Jersey Archive | Notes |
|---|---------------------------------|---|----------------------------------|---------------------------|
| Management and Overview Records | | | | |
| Managers' correspondence including email | End of project plus 1 year | Review, weed for duplicates and transfer high level information to Jersey Archive | Archive | |
| All Staff – General Correspondence, including email | Retain until no longer required | Transfer relevant emails to project folders and delete low-level emails | Archive relevant project folders | Refer to SoJ email policy |
| Meeting Minutes | 7 years | Transfer minutes of high-level/policy meetings to Jersey Archive. Destroy low level meeting minutes/action points | Archive | |
| Strategies & Reports – internal and consultants' (eg) Annual Report, Business Plan and Statistics | 7 years | Transfer to Jersey Archive on production | Archive | |
| Organisation start-up paperwork | 10 years | Transfer overview records to Jersey Archive | Archive | |

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| Launch of new apprenticeship schemes | 10 years | Transfer overview records to Jersey Archive on production | Archive | |
| Service Level Agreements | 5 years after end date of SLA | Transfer copy of first SLA to Jersey Archive and any significant revisions | Archive | |
| Policies and Procedures | 7 years | Transfer copy of each and any significant updates on production to Jersey Archive | Archive | |
| Jersey Specific Guidelines | Retain until no longer required | Transfer copy of each to Jersey Archive | Archive | |
| Non-Jersey Specific Guidelines | Retain until no longer required | Destroy | | |
| Photographs | Retain until no longer required | Review with Jersey Archive and transfer annually small sample of historic interest | Archive | |
| Leaflets and Publicity Material (eg) for all Open Days and Events | 10 years | Transfer copy of each to Jersey Archive on production | Archive | |
| Press Releases | 5 years | Transfer copy of press releases of high public-interest on production to Jersey Archive | Archive | |
| Enquiries, Complaints & Responses | 10 years | Transfer to Jersey Archive those of high public-interest and those which lead to the making of, or changes in policy | Archive | |
| Speeches and Presentations | 10 years | Transfer a copy of strategic speeches and presentations annually to Jersey Archive | Archive | |
| Newspaper Cuttings | 10 years | Transfer to Jersey Archive | Archive | |
| Debtors List | 10 years | Destroy unless they need to be kept for longer | | Education advice to Careers |

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| Websites and Social Media feeds | Updated regularly | Jersey Archive to capture | Archive | Crawled as part of agreement with British Library |
| Student and Employer Records | | | | |
| Blank apprenticeship contract template | Retain until superseded | Transfer copy and any significant updates to Jersey Archive | Archive | |
| Successful apprentice records (electronic) | Retain until apprenticeship completed plus 10 years | Delete | | Data is anonymised after 2 years and used for reporting |
| Successful apprentice records (paper) | Retain until apprenticeship completed plus 2 years | Destroy | | |
| Unsuccessful apprentice applications | Current plus 1 year | Destroy | | |
| Student/Mentor Review Meetings | Current plus 2 years | Hand over to student on apprenticeship completion or destroy if student doesn't want them | | |
| Employer Database | Regularly updated | Delete information when no longer required | | |
| New Starter Packs for Employers and Apprentices | Retain until superseded | Transfer one of each pack and any significantly updated packs to Jersey Archive | Archive | |
| Student Finance Section | | | | |
| Student Files | Current + 5 Years | Destroy unless they need to be kept longer for administrative/legal reasons | | The Archive wouldn't keep all individual student finance files |
| Fee invoices | 10 years | Destroy unless they need to be kept longer for administrative/legal reasons | | |
| Reconciliations | 10 years | Destroy unless they need to be kept longer for administrative/legal reasons | | |
| Debtor Lists | 10 years | Destroy unless they need to be kept longer for | | |

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| | | administrative/legal reasons | | |
| Handbook + appendices | | Transfer one copy to Archive on production | Archive | |
| Lord Portsea Minutes | 10 years | Transfer to Archive | Archive | |
| Lists of students | 5 years after graduation | Transfer one copy to Archive each year | Archive | |
| *Refer to Education Finance Retention Schedule | | | | |
| Work Related Learning - Trident | | | | |
| Trident Annual Report | | Transfer one copy to Archive each year | Archive | |
| Student related records, e.g. Blue Agreement Forms, reports, inductions and teachers visit. | Current + 2 Years | Destroy unless need to be kept for administrative/legal purposes | | |
| Tracking Lists | Current | Destroy when no longer required | | |
| Correspondence | Current + 2 Years | Attach to Student Application Form | | Destroy with application forms |
| Employer Information | Current + 6 Years | Destroy | | |
| Work Related Learning – Other | | | | |
| Young Enterprise Application Forms | Current + 2 years | Destroy | | |
| YE – Examination entry lists | Current + 2 years | Destroy | | |
| YE – Police Checks | Current + 2 years | Destroy | | |
| IOD work shadowing applications | Current + 2 years | Destroy | | |
| CIM work shadowing applications | Current + 2 years | Destroy | | |
| Advice & Guidance | | | | |
| Interview Records | 1 year | Destroy | | |
| Client Records | Date of last contact + 2 years | Destroy | | |
| Statistical Reports | Current + 2 years | Transfer to Archive | Archive | |
| Team meeting Minutes | Current +1 Years | Destroy | | |
| Event Information | Current + 1 year | Transfer one copy to Archive on production | | |
| Education Liaison | | | | |
| Careers Teachers Meeting Minutes | Current + 2 years | Transfer to Archive | Archive | |
| Destination Reports | Current + 10 years | Transfer to Archive | Archive | Sent to Education Stats Unit |
| Other Records | | | | |

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| Project Records | Please refer to Generic Projects Retention Schedule | | | |
| All Financial Records | Please refer to Financial Direction 12.7 | | | |
| All HR and Training Records | Please refer to SoJ Personnel Retention Schedule | | | |
| Health and Safety Records | Please refer to Generic Health and Safety Retention Schedule | | | |
| Contracts | Please refer to Generic Contracts Retention Schedule | | | |

*The following information will come to Jersey Archive from the States Greffe:

- Copies of Legislation/Projects
- Signed Ministerial Decisions
- Copies of Reports submitted to the States Assembly
- Copies of Scrutiny Reports

APPROVED AND SIGNED BY SKILLS JERSEY:

| Name | Signature | Position | Date |
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APPROVED AND SIGNED BY JERSEY ARCHIVE:

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