

Infrastructure and Environment (I&E)
Jersey Property Holdings (JPH)
Project, Contractual and Building Records
Retention Schedule

November 2024

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 the Infrastructure and Environment 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: November 2029

Record Type Title	Retention by I&E (Unit)	Retention by I&E (Number of Units)	Action by I&E	Notes
Architects/Design Section				
Historic plans pre 1950	Years	20	Transfer to Jersey Archive	
Pre 1950 project files (if any exist)	Years	20	Transfer to Jersey Archive	
Post 1950 project files	Years	20 from final certificate	Review transfer 3a – f, 3k – p to Jersey Archive 20 years from Final Certificate	
Preliminary design/sketches	Years	20	Transfer to Jersey Archive	
Presentation drawings/boards	Years	20	Transfer to Jersey Archive	
Contracts with contract drawing & bills of quantities & notes of negotiations	Years	20	Transfer only unique pages of contracts & other unique items	

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Contracts & other unique items				
As-built drawings, including M & E, where these differ from contracts drawings	Years	20	Transfer to Jersey Archive	
Architect's instructions & correspondence concerning changes	Years	20 from final certificate	Destroy	
Copy M & E drawings and specifications	Years	20 from final certificate	Destroy	
Shop drawings and specifications	Years	20 from final certificate	Destroy	
Artistic drawings of decorative features	Years	20	Transfer to Jersey Archive	
Minutes of site meetings etc.	Years	20 from final certificate	Destroy	
Project schedules	Years	20 from final certificate	Destroy	
Photographic records	Years	20	Transfer to Jersey Archive	
Clerk of Work logs/diaries	Years	10	Transfer to Jersey Archive	
Other site records	Years	20	Destroy	
General correspondence	Years	20	Destroy	
Materials tests results	Years	20	Destroy	
Reports on historic buildings	Years	20	Transfer to Jersey Archive	
Estate Management				
Property File / Portfolio, includes rent reviews, leases, licenses, acquisition and disposal, appointment of surveyors and legal/conveyancing.	Years	10 review	Review, weed and transfer contents of files that are over 10 years old (from end date of file) to Jersey Archive and any files for properties that have been disposed of. Transfer of properties should include all examples of the following:	Freehold and Leasehold properties included with the presumption that the sample will primarily contain Freehold properties

Record Type Title	Retention by I&E (Unit)	Retention by I&E (Number of Units)	Action by I&E	Notes
			<ul style="list-style-type: none"> Listed Buildings/Heritage properties Schools Main States Office properties Cafes Health properties Trust properties All Property Holdings properties	
Ministerial Decisions	Years	5	Destroy	Archive receives these from the States Greffe
Maintenance				
Contracts for maintenance with 3 rd parties	Years	10 after completion of contract	Transfer to Jersey Archive	
Orders for reactive maintenance	Years	10	Review and destroy	
Certification of compliance and state of buildings	Years	10	Review and destroy	
Insurance Claims	Nil		Pass to Treasury	
Small Maintenance Projects	Years	10 after completion	Sample of all projects involving property of historic significance to Archive	
Capital Projects	Years	10 after completion	See below for more detailed schedule for projects	
Generic Schedule for Project Files				
Project proposals – approved	Years	10 after completion	Transfer to Jersey Archive	
Project proposals – rejected or deferred	Years	5 after rejection or deferral	Destroy	
Project initiation documents – e.g. project brief or statement of requirements, business case, scope, project plan, timetable, available resources and budget, risk assessment,	Years	10 after completion of project	Transfer to Jersey Archive	

Record Type Title	Retention by I&E (Unit)	Retention by I&E (Number of Units)	Action by I&E	Notes
compliance assessments, project approval				
Feasibility Studies – working papers, draft reports and correspondence	Years	2 after completion of project	Destroy	
Final feasibility report – approved	Years	10 after rejection or deferral	Transfer to Jersey Archive	
Final feasibility report – rejected or deferred	Years	5 after completion of project	Destroy	
Specifications and statements of requirements – provisional/proposed/draft	Years	5 after completion of project	Destroy	
Specifications and statements of requirements – final	Years	20 after completion of project	Transfer to Jersey Archive	
Plans – preliminary/proposed	Years	20 after completion of project	Transfer to Jersey Archive	
Plans – final contract plans or drawings	Years	20 after completion of project	Transfer to Jersey Archive	
Contractor/ supplier/ product selection – standing approved list	Current		Destroy when new list issued	
Contractor/ supplier/ product selection – requests for information or proposals or invitation to tender	Years	10 years after completion of project	Destroy	
Contractor/ supplier/ product selection – responses/tender and evaluation reports – approved	Years	20 after completion of project	Transfer to Jersey Archive	
Contractor/ supplier/ product selection – responses/tender and evaluation reports – rejected	Years	5 years after rejection	Destroy	
Contractor/ supplier/ product selection – minutes and record set of papers to tender board or selection process	Years	10 after completion of project	Transfer to Jersey Archive	

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Contractor/ supplier/ product selection – tender board working papers and duplicates/drafts of above	Years	2 after completion of selection process	Destroy	
Contracts and agreements for supply or work	Years	10 after completion of contract	Transfer to Jersey Archive	
Bills of quantities	Years	20 after completion of project	Transfer to Jersey Archive	
Maps, plans and drawings – working and other copies, shop drawings etc.	Years	5 after completion of project	Destroy	
Maps, plans and drawings – master set or as-built drawings, including M & E and structural drawings, where these differ from contract drawings	Years	20 after completion of project	Transfer to Jersey Archive	
Artistic impressions	Years	20 after completion of project	Review and transfer to Jersey Archive	
Photographic records	Years	20 after completion of project	Review and transfer to Jersey Archive	
Correspondence and papers relating to variations in specifications	Years	10 after completion of project	Destroy	
Financial documents – total budget and budget control, cost plans	Years	10 after completion of project	Review and transfer to Jersey Archive	
Financial documents				See retention schedule for financial records from Treasury & Exchequer
Project development – records of testing of equipment, supplied goods or materials	Years	10 after completion of project	Destroy	
Project development – Site records	Years	10 after completion of project	Review and transfer to Jersey Archive	
Project development – project schedules	Years	10 after completion of project	Destroy	

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Project development – contingency and backup plans	Years	10 after completion of project	Destroy	
Project development – interim certificates/sign-off of work completed	Years	20 from completion of project	Review and transfer to Jersey Archive	
Human resources				See Retention Schedule for People & Corporate Services records Most of these will only be duplicates of records kept by Human Resources
Health and safety records				See Retention Schedule for health and safety records Refer to Corporate H&S Manager
Project Management and Project Boards – Minutes and reports	Years	20 from completion of project	Transfer to Jersey Archive	
Project Management and Project Boards – general correspondence	Years	5 after completion of project	Destroy	
Project Management – site meeting minutes	Years	10 after completion of project	Transfer to Jersey Archive	
Project evaluation and final reports	Years	10 after completion of project	Transfer to Jersey Archive	
Product descriptions	Years	5 after completion of project	Destroy	
Product operating manuals	Retain whilst current		Destroy	
Claim and arbitration records	Years	20 years after settlement	Transfer to Jersey Archive	
Site/Measured Surveys	Years	25	Transfer to Jersey Archive	
Generic Schedule for Contractual Records				
Contract policy	Current / Years	2	Transfer to Jersey Archive	


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End user requirement/brief	Years	10	Transfer to Jersey Archive	
Contractor/ supplier/ product selection – standing approved list	Current		Destroy when new list issued	
Statements of interest	Year	1	Destroy	
Draft specifications	Current		Destroy when specification agreed	
Agreed specification	Years	20 from completion of project	Transfer to Jersey Archive	
Evaluation criteria	Years	10	Transfer to Jersey Archive	
Invitation to tender	Years	10	Destroy	
Unsuccessful tender documents	Years	5 after rejection	Destroy	
Successful tender documents – e.g. tender board or selection process	Years	20 after completion of contract	Transfer to Jersey Archive	
Minutes and record set of papers of tender board or selection process	Years	10 after completion of contract	Transfer to Jersey Archive	
Contractor/ supplier/ product selection – tender board working papers and duplicates/draft of above	Years	2 after completion of selection process	Destroy	
Commissioning letter	Years	20 from completion of project	Transfer to Jersey Archive	
Signed contract	Years	20 from completion of project	Transfer to Jersey Archive. Note that with standard form or model contracts only unique pages need to be kept	
Contract drawings	Years	20 from completion of project	Transfer to Jersey Archive. Note that with standard form or model contracts only the unique pages need to be kept	
Contract negotiation Papers	Years	10	Destroy	

Record Type Title	Retention by I&E (Unit)	Retention by I&E (Number of Units)	Action by I&E	Notes
Generic Schedule for Building Records				
Maintenance schedules	Retain until superseded		Destroy	
Maintenance diaries or logs	Years	16 after final entry	Destroy	
Installation surveys (plant and services)	Years	16 after date of survey	Review and transfer to Jersey Archive	
Incident reports	Review (check with HSI)	5 after action or, if a claim is made, 6 years after settled (check with HSI)	Review	
Maintenance programme	Retain until superseded		Destroy	
Maintenance and operational manuals	Retain until equipment disposed of		Destroy	
Health and safety inspection reports	Years	12	Review and destroy	
Accident Books	Years	3 after date of last entry	Review and destroy	
Accident Reports	Years	Review 5 after action or, if a claim is made, 6 years after claim settled	Review and Destroy	
Plant and equipment condition surveys	Years	Review 10 after date of survey	Retain until subsequent survey	
Maintenance contracts and related correspondence	Years	12 after end of contract	Review and destroy	
Meetings with contractors - agenda, minutes etc., record set	Years	5	Transfer to Jersey Archive	
Meetings with contractors – agenda, minutes etc., other copies	Years	6	Destroy	
Meetings with contractors – draft, domestic	Years	3	Destroy	
Forward maintenance registers (FMR)	Years	16 after date of last entry	Review and destroy	
Asbestos registers	Years	50 after date of last entry	Transfer to Jersey Archive	
Financial and accounting	Years	12	Review	
Asbestos inspections	Years	40	Review	


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Conservation	Years	25	Transfer to Jersey Archive	
Other specialist reports not referred to above	Years	10	Transfer to Jersey Archive	
Legal Documents				
Title deeds	Until disposal of property		Review	
Leases (signed copies)	Years	16 after expiry	Destroy	
Memoranda of terms	Years	16 after expiry	Destroy	
Sub-letting agreements	Years	12 after termination	Destroy	
Landlords' consents	Years	16 after surrender, expiry of termination of lease or memoranda of terms	Destroy	
Licenses	Years	16 after surrender, expiry or termination of lease or memoranda of terms	Destroy	
Schedules of known tenant alterations	Years	16 after surrender, expiry or termination of lease or memoranda of terms	Destroy	
Tests and statutory certificates	Years	12 after expiry or superseded	Destroy	
Asbestos incidents – correspondence, reports and papers	Years	50 after date of event	Review with HSI	
Staff work Diaries	Years	5	Review and destroy	
Generic Schedule for Reports				
Architectural Master copy	Years	25	Transfer to Jersey Archive	
Architectural Other copies	Years	5	Destroy	
Structural engineering	Years	15	Transfer to Jersey Archive	
Mechanical and electrical engineering	Years	15	Transfer to Jersey Archive	
Drainage services	Years	15	Transfer to Jersey Archive	

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Building condition surveys	Years	25	Transfer to Jersey Archive	
Quadrennial inspections	Years	25	Review	
Fire precautions and services	Retain until superseded		Review 10 years after issue	
Timber structures	Retain until superseded		Review 10 years after issue	
Archaeological features	Years	25	Transfer to Jersey Archive	
Fire Certificates	Years	12 after expiry or superseded	Destroy	
Planning consents and correspondence	Years	25 after issue	Transfer to Jersey Archive	
Listed buildings consents and correspondence	Years	25 after issue	Transfer to Jersey Archive	
Correspondence				
Consultants and contractors	Years	16 date of last paper	Review	
Statutory authorities	Years	25 after date of last paper	Review	
Utility and communication companies	Years	16 after date of last paper	Review	
Microsoft Teams Chat	21 days	Destroy		This change affects everything under the Chat icon in Microsoft Teams. It includes any chats that have taken place within meetings and individual chats.
Publicity				
Photographic records	Years	10	Transfer sample to Jersey Archive	
Publicity Literature	Years	5	Transfer to Jersey Archive	
CCTV	Days	28	Destroy	
Historical Narratives	Years	10 years	Transfer to Jersey Archive	

**APPROVED AND SIGNED ON BEHALF OF THE INFRASTRUCTURE AND ENVIRONMENT
DEPARTMENT BY:**

Name	Signature	Position	Date
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APPROVED AND SIGNED BY JERSEY ARCHIVE:

Name	Signature	Position	Date
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