

## Retention of Documents Policy

The Retention of Documents Policy was adopted at the Council meeting in November 2017

The Parish Council recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the Parish Council.

This document provides the policy framework through which this effective management can be achieved and audited. It covers:

Scope Responsibilities Retention Schedule Scope of the policy

This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Parish Council and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

### Responsibilities

The Parish Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. The person with overall responsibility for the implementation of this policy is the Clerk to the Parish Council, and she is required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

### Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the record series which it creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

The Clerk is expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when creating new record keeping systems. This retention schedule refers to record series regardless of the media in which they are stored.

### Retention of Documents

Document Minimum Retention Reason

Minute Books	In perpetuity	Archive	Annual Accounts	In perpetuity	Archive	Annual Return
In perpetuity	Archive	Bank statements	7 years	Audit/management	Cheque book stubs	Last completed audit
Management	Paying in books	Last completed audit	Management	Quotations	7 years	Audit
Paid invoices	7 years	Audit/VAT	VAT records	7 years	Audit/VAT	Salary records
7 years	Audit	Tax & NI records	7 years	Audit	Insurance policies	Whilst valid
					Audit	Cert of

Employers Liability 40 years    Audit/legal Cert of public liability 40 years    Audit/legal Assets register In perpetuity    Audit Deeds, leases In perpetuity    Audit Booking policy 7 years  
Management Copies of bills to hirers 7 years    Management/audit

#### Planning Applications

All planning applications and relevant decision notices are available at TDC. There is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the Council minutes and are retained indefinitely. Correspondence received in connection with applications will be retained as stated below.

Declarations of acceptance Term of Office + 1 year Management

Members register of interests' book Term of office + 1 Management

Complaints 1 year Management

General information 3 months Management

Routine correspondence & e-mails 6 months Management

Disposal procedures: all documents that are no longer required for administrative reasons should be shredded and disposed of.

Next Review November 2019