

Document Retention Policy

The legal position is that a local council has custody of the “specified papers” of the parish or community according to Section 226 Local Government Act 1972. These papers are defined as the public books, writings, photographs and papers of the parish and this policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions and 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 Parish Council’s archives and for historical research.

Access to, and use of, any of the “specified papers” shall only be in conformance with the relevant regulations and the Parish Council’s Freedom of Information policy.

Document/record	Minimum Retention Period
Administration	
Signed minutes of council meetings	Indefinite- archive
Councillor’s Declarations of Office	Term of office plus two years
Correspondence and papers on important local issues or activities	Indefinite- archive
Quotations & tenders for works	7 years
Title deeds, Leases, Agreements & Contracts	Indefinite
Routine correspondence, papers & e-mails	Retain as related to the subject, or as long as useful
Personnel records, salary, PAYE	7 years after ceasing employment
Planning applications & related papers refused	Retain until appeal period has expired
Planning applications & related papers granted	Retain until development has been completed
Employer’s Liability Insurance Certificate	Indefinite
Insurance policies and correspondence claims	Whilst valid
Finance	
Receipt and payments accounts / Audits>Returns	Indefinite- archive
Bank Statements	7 years
Bank Paying in Book & Cheque book	Last completed audit
Paid Invoices	7 years
VAT Records	7 years
Miscellaneous	
Reports, Guides, Handbooks etc received from other bodies	Retain as long as useful
General Correspondence	Retain as long as useful

This policy will be reviewed on a regular basis and the Parish Council may amend the retention period or dispose of any material no longer required to be retained, felt relevant or of any useful purpose.

The nominated custodian of the “specified papers” of the Parish Council is the Clerk. He/She shall ensure that they are held securely against loss and unauthorized access as far as is reasonably possible. For such purposes backup copies may also be held in such formats and locations as is reasonably practical and economic.

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

POLICY:	Document Retention Policy		
Establishment: 12 th April 2021	Assessment by:	Signed:	Date:
1st Review Date Due :	Clerk Approval:	Signed:	Date: