

Woolbeding with Redford Parish Council - Retention and Disposal of Documents Policy

Woolbeding with Redford 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 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

Woolbeding with Redford 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 s/he 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 documents regardless of the media in which they are stored.

Disposal procedures

All documents that are no longer required for administrative reasons should be shredded and disposed of and emails permanently deleted.

Planning Applications

All planning applications and relevant decision notices are available at CDC/SDNP. There is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the Council minutes and these are retained indefinitely.

RETENTION OF DOCUMENTS

Document	Minimum Retention	Reason
Administrative		
Agendas	Indefinite	Archive
Signed Minutes	Indefinite	Archive
Register of Electors	While current	Common practice
Financial Records		
Annual Accounts	Indefinite	Archive
Annual return	Indefinite	Archive
Bank statements	6 years	Audit
Budget Control Documents	6 years	Common practice
Cheque Book stubs	6 years	Common practice
Paying-in Book stubs	6 years	Common practice
Quotations/Tenders	6 years	Audit
Paid Invoices	6 years	Audit/VAT
Sent Invoices	6 years	Audit/VAT
VAT records	6 years	Audit/VAT
Salary records	6 years	Audit
Insurance Policies	Whilst valid	Audit
Assets Register	Indefinite	Audit
Certificate of Employers' liability	40 years	Audit/legal
Certificate of Public liability	40 years	Audit/legal
Legal Documents		
Title Deeds and leases	Indefinite	Audit/Management
Agreements and contracts	While valid plus 1 year	Audit/ Management
Councillor Information		
Applications for co-option	Term of office plus 1 year	Common practice
Declaration of acceptance of office	Term of office plus 1 year	Common practice
Register of Members interests	Term of office plus 1 year	Common practice
Members allowances register	6 years	Audit/legal
Code of conduct complaints	Term of office plus 1 year	Common practice
Personnel Information		
Personnel files	6 years after end of employment	Audit/Management
Application forms	1 year	Discrimination Acts
Other Information		
Complaints	1 year after conclusion	Common practice
FOI requests	1 year after conclusion	Common practice
General information	3 months	Common practice
Routine correspondence and emails	6 months after relevant issue is completed	Common practice

Recordings of meetings	After formal sign-off of minutes	Common practice
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This policy was adopted by Woolbeding with Redford Parish Council on 21st May 2022.