



# Holybrook Parish Council

Proudly serving the residents of Holybrook Parish since 2000

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## Retention Policy/Schedule

### **POLICY INFORMATION**

A Retention Schedule is a list of records that need to be kept by Holybrook Parish Council for a specific length of time.

This schedule contains recommended retention periods for records created and maintained by the Parish Council and refers to all information regardless of the media in which it is stored.

The aim of the Retention Schedule is to provide a consistent approach to the way the Council handles its records and provide a clear set of guidelines.

A Retention Schedule serves the purpose of identifying records that may be worth preserving permanently as a part of a local authority archive as well as preventing the premature destruction of records that need to be retained for a specific legal, financial or statutory period.

This Retention Schedule details the function of each record, the type of records that may fall within this function and the length of time the Council should hold the record before taking disposal or archive action.

### **Many retention periods are determined by statute.**

All data and records (active and archive) will be stored in accordance with appropriate security requirements and in the most convenient and appropriate location. The degree of security required for file storage will reflect the sensitivity and confidential nature of the recorded material.

To summarise; the Council needs to keep accurate and timely records for the appropriate period of time, making sure that obsolete records are securely disposed of in an appropriate manner.

## **DEFINITIONS AND MEANINGS**

'Council' and 'Parish Council' refers to Holybrook Parish Council

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Holybrook 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
- Relationships with existing policies
- 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 and/or electronically.

## **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 this policy is the Parish Council.

The Clerk will give staff and councillors guidance for good records management practise and will promote compliance with this policy so that information can be retrieved easily, appropriately and within an appropriate time frame.

Individual staff and councillors must ensure that records, for which they are responsible, are accurate and are maintained and disposed of in accordance with the Parish Council's records management guidelines. Individual councillors may hold records securely in hard copy format or electronically at home or on their home computers. If a councillor considers that some of these documents are important in the context of the Parish Council's records, they should ensure that the Parish Office retain a copy for the official record. Individual councillors are strongly advised to undertake "weeding" and "housekeeping" on a regular basis.

## **RELATIONSHIP WITH EXISTING POLICIES**

This policy has been drawn up within the context of:

- Freedom of Information Policy
- Data Protection Policy/Publication Scheme

And with other legislation or regulations (including audit and Statute of Limitations) affecting the Parish Council.

**RETENTION SCHEDULE**

The Parish Council is required to maintain a retention schedule listing the record series which it creates during 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.

Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems.

The retention schedule refers to record series regardless of the media in which they are stored. Please see Appendix 1

This policy will be reviewed annually by Holybrook Parish Council to ensure that it is relevant to working practice.

Adopted by Holybrook Parish Council:

<b>Date Policy Adopted:</b>	June 2018
<b>Reviewed and updated</b>	Monday 13 <sup>th</sup> May 2024 (V3)
<b>Date of Next Review:</b>	May 2025



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## APPENDIX 1

### RETENTION SCHEDULE:

Document	Minimum retention	Reason
<b>Minutes</b>		
Signed council and committee Minutes	Indefinite. Bind and file with the Records Office after a period of 6-years.	Archive
Draft/rough/notes of minutes taken at meetings	Until the date of confirmation of the minutes.	Management
<b>Agendas</b>		
Agenda	Destroy after a period of 6-years but retain if minutes do not survive.	Archive
Reports and other documents circulated with agendas	Retain, but destroy if copies are included with signed minutes.	Archive/Management
<b>Correspondence</b>		
Correspondence/papers on important local issues/activities	Indefinite for items of particular historic interest.	Archive
Routine correspondence, papers & e-mails	1-year or until there is no longer an administrative requirement.	Management
Register of electors	Until there is no longer an administrative requirement	Management
Byelaws and orders	Preserve one of each copy	Archive
<b>Finance &amp; Payroll</b>		
Receipts & payments books	Indefinite	Archive
Annual Return & Audited Accounts	Indefinite	Archive

Correspondence relating to Audit	Last completed audit	Audit/Management
Cheque book stubs	Last completed audit	Management
Paying in books	Last completed audit	Management
Budgetary control papers	2 years + current year	Audit
Bank statements	7 years	Audit/Management
Petty Cash book (the council does not hold petty cash)	7 years	Management
Grant applications	7 years	Management
Quotations and tenders successful	12 years	Limitation Act 1980
Quotations and tenders unsuccessful	2 years	Management
Paid invoices	7 years	Audit/VAT
VAT records	7 years	Audit/VAT
Salary records	12 years after termination of service	Statute limitations
Pension payments	12 years after termination of service	Statute limitations
Time sheets	Last completed Audit	Audit/Management
Tax/NI Records	7 years	Audit
Members' allowance	7 years	Tax, Limitation Act 1980 (as amended)
<b>Insurance Policies</b>		
Insurance policies	Whilst valid	Audit
Cert. Employers Liability	40 years	Audit/Legal
Cert. Public Liability	40 years	Audit/Legal
Insurance claims records	7 years after conclusion	Audit/Legal
Policy renewal records	Whilst valid	Management
<b>General Management</b>		
Assets Register	Indefinite	Audit
Deeds; leases	Indefinite	Audit
<b>Beansheaf Centre</b>		
Signed Booking Form and Conditions of Hire	7 years	Management
Copies of invoices to hirers	7 years	Management/Audit
Bank details for Faster Payment	6 months from payment	Management

Record of 'bad' hirers	7 years	Management
Scale of fees and charges	Until superseded by new charges	Management
Diary	7 years	Management
Lease	Indefinite	Audit
Waste Transfer Notes	Two years	Environmental Protection Act (1990) and subsequent regulations)
<b>Health &amp; Safety</b>		
Accident books	25 years from closure	Management
Equipment inspection records	25 years	Management
Premises Inspection records	25 years	Management
Risk Assessments	7 years from last assessment	Management
Defibrillator checks	7-years	Maintenance Records
Weekly core-point testing records	7-years	Maintenance Records
<b>Members</b>		
Register of Members' Interest	18 months after individual ceases to be a member	Management
Declarations of Acceptance	Term of Office + 1 year	Management
Contact details	Whilst in office	Management
<b>Personnel/Human resources</b>		
Application forms (unsuccessful)	1 year after recruitment finalised plus current year	Sex Discrimination Acts 1975 and 1986, Race Relations Act, Disability Discrimination Act 195, Employment Equality (sexual orientation) regulations, Employment Equality (Religion or Belief Regulations)
Application forms (successful)	9 months after recruitment finalised	

Disciplinary Records	12 years after termination of service	Risk of investigation regarding any future litigation
Personal Files (appraisals/pay reviews etc)	12 years after termination of service	Risk of investigation regarding any future litigation
<b>Miscellaneous</b>		
Complaints	2 years of closure	Management
Information requests	2 years after closure	Management
Press releases	5 years or permanent if of historic interest.	Management
Public Consultations	5 years or whilst projects still active if more than 5-years	Management
Reports/Newsletters	As long as is useful.	Management
Planning applications for approved planning	No requirement to retain	Management
Planning applications for refused applications	No requirement to retain.	Operational

General correspondence, guides, handbooks etc will be retained for as long as is relevant. An annual review of all documentation should be carried out and items that have reached their deletion or destruction date being deleted/destroyed and the remainder being considered for archiving.