



Meeting Date:	25th March 2020
Report Subject:	Retention of Documents Policy
Contact:	Clerk/Chairman

Ref:20 Retention & Disposal of Records

The policy applies to all records created, received or maintained by the Council whether in electronic or hard copy form.

Responsibility under this policy rests primarily with the Clerk of the Council. If any individual Councillor holds records (in any form) and they are of importance to the Council's business they should be copied to the Clerk for her to retain. Councillors are advised to retain only a minimum of important records themselves and, on leaving the Council all Councillors must ensure that the Parish Clerk has copies of all important documents and must then delete all electronic records they hold and destroy all hard copy documents.

The Freedom of Information Act requires the Council to maintain a retention schedule listing record types it creates in the course of its business. The schedule lays down the length of time the record type needs to be retained and specifies what action should be taken when a record is of no further administrative use.

Retention Schedule

Document Type	Minimum Retention	Reason
Annual Accounts	Indefinite	Archive
Annual Return	Indefinite	Archive
Asset Register	Indefinite	Audit
Banking Records	7 years	Audit
Complaints records	2 years	Management
Correspondence not otherwise specified	2 years	Management
Declaration of Acceptance of Office	Term of Office + 4 years	Management
Deeds & Leases	Indefinite	Audit/Management
Employers & Public Liability Certificates	40 years	Audit/Legal
General records for otherwise specified	2 years	Audit/Management
Insurance Policies	2 years	Audit
Invoices to Users of Council Services	7 years	Audit/Management
Members' Register of Interests	Term of Office + 4 years	Management
Minute Books	Indefinite	Archive
Paid Invoices	7 years	Audit/VAT
Planning Records	No retention	See Note 1
Policy Documents	7 years	Management
Quotations	7 years	Audit
Salary, Tax & NI Records	7 years	Audit
VAT records	7 years	Audit/VAT

Note 1: All planning applications including decisions are retained by BCP. All Parish Council recommendations are recorded in Council minutes and retained indefinitely. There is no need for any further retention.

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