

Drakes Broughton and Wadborough with Pirton Parish Council

Document and record retention policy

PURPOSE

This policy is to ensure that the Parish Council manages records to comply with the requirements of its legal and regulatory obligations and to ensure that there is a consistent policy for the destruction of documents and records. The policy applies to all records created, received or maintained, in hard copy or electronically, by the Council in the course of carrying out its functions.

RESPONSIBILITIES

The Parish Council has a corporate responsibility to maintain and manage its records in accordance with the regulatory environment. The Clerk to the Parish Council has overall responsibility for the implementation of the policy.

RETENTION OF DOCUMENTS

The table below indicates the appropriate record retention period for audit purposes and the reasons for retention.

Type of record

The major classes of record specifically relating to each function have been identified and retention recommendations are provided for each. However, the list of record types provides examples only and is not exhaustive

Minimum retention period

This is the minimum period for which the record should be retained before it is destroyed or reviewed.

Type of record	Minimum retention period	Retention reason
Minutes	Indefinite	Archive
Annual Accounts	Indefinite	Archive
Annual Return	Indefinite	Archive
Assets register	Current version and last completed audit version	Audit, Management
Bank Statements including deposit/savings accounts	6 years	Audit
Cheque book stubs	Last completed audit	Audit
Deeds/ leases	Indefinite	Audit, management
Employee letters of appointment, contracts and associated personnel records	6 years from termination of employment	Management
Insurance policies	Whilst valid	Management
Paying in books	Last completed audit	Audit
Paid invoices	6 years	VAT

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Planning applications granted non contentious	Until completion	Reference
Planning Applications denied/appealed, contentious granted and or ongoing	2 years minimum but as long as may be required	Reference
Quotations/ formal tenders	12 years	Limitation Act 1980
VAT records	6 years	VAT
Routine correspondence/ general information	3 months	Management
Salary records	6 years	Audit/ Tax
Safety inspections and Maintenance	12 years	Limitations Act 1980

ADOPTED BY COUNCIL ON REVIEW DATE.....

SIGNED(Chairman)

SIGNED(Clerk/ RFO)