

WINDLESTONE PARISH COUNCIL

DOCUMENT RETENTION POLICY

Introduction

The 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, retention schedule and 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 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

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 the implementation of this policy is the clerk to the parish council, and they are 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 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, taking the schedule into account when creating new record keeping systems. This retention schedule refers to record series regardless of the media in which they are stored.

Retention of Documents

Minute(s) Books - Indefinite

Annual Accounts (Inc AGAR) – 7 Years

Cheque book stubs - Last completed audit year

Paying in books - Last completed audit year

Quotations - 7 years

Paid invoices 7 years

VAT records – 7 years

Salary records 12 years

Tax & NI records - 7 years

Insurance Documents - 25 years (Certificates Only) (Policy for current year to be kept only)

Assets register - Indefinite

Deeds & Leases - Indefinite

Declarations of Acceptance of Office – Current Election Period (4 years)

Members Register of Interests' – Current Election Period (4 Years)

Complaints – 2 years

General Information - 1 Year