



Newtown Parish Council Retention of documents policy
Formally adopted on 9th September 2024
Next review date: September 2025

Newtown 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

Scope

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

The Parish Council has a corporate responsibility to maintain its records and record management system in accordance with the regulatory environment. The person with overall responsibility for the implementation of this policy is the Clerk to the Parish Council who 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. Individual Councillors may hold records in a hard copy format or electronically at home on their computers. Councillors are strongly advised to undertake 'housekeeping' on a regular basis in line with the retention schedule. On resigning from the Council, Councillors should delete all electronic records that they hold and return all hard copy documents to the Clerk. Councillors should be aware that the records they hold may be subject to the provisions of the Data Protection Act 2018, the Freedom of Information Act 2000 and the GDPR Regulations.

Retention Schedule of Documents and Records

Under the Freedom of Information Act 2000 Publication Scheme, the Parish Council is required to maintain a retention schedule listing the record series which it creates in the course of its business. This policy has also been drawn up in the context of the Data Protection Act 2018 and with other legislation or regulations affecting Parish Councils including Audit and Statutes of Limitation. 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 record series regardless of the media in which they are stored. All documents that are no longer required for administrative purposes will be disposed of securely e.g. shredded. This policy will be reviewed annually, unless required earlier by legislation or additional material.

Document Type	Retention Period	Note
Meetings		
Approved minutes	Indefinite	Archive
Notes taken at meetings	Until minutes are approved	
Agendas and supporting documents	2 years	
Finance		
Income and expenditure accounts	Indefinite	Archive
Annual Return (AGAR)	Indefinite	Archive
Paid invoices	6 years	VAT
VAT records	6 years	VAT
Bank statements	Last completed audit year	
Income records	6 years	
Cheque stubs	Last completed audit year	
Bank mandate	Until confirmation is received that it has been implemented	
Insurance		
Policy documents	5 years	
Certificate of employers' liability	40 years	Limitation period
Employment		
Employment contract	6 years after employment ceases	
Application forms (unsuccessful candidates)	6 months	
Disciplinary records	6 years after employment ceases	
Appraisals	6 years after employment ceases	
PAYE records	12 years	Superannuation
Councillor records		
Declarations of acceptance of office	Term of office + 1 year	
Members register of interests	Term of office + 1 year	
Miscellaneous		
Contract tenders	6 years	Limitation period
Title deeds, leases, agreements, contracts	Indefinite	
Accident report forms	3 years	
Complaints	2 years from resolution	
Asset register	Indefinite	

General correspondence: this will be retained for as long as is relevant, the minimum period is 1 year. An annual review will be carried out and items that have reached their destruction date will be destroyed or considered for archiving.

Planning applications: these are available at Basingstoke and Deane Borough Council. There is no requirement to retain duplicates at parish level. All Parish Council recommendations in connection with these applications are recorded in the Parish Council minutes which are retained indefinitely and can be accessed on the Planning Portal of BDBC.