

Hesket Parish Council

RETENTION OF DOCUMENTS POLICY

Adopted by Full Council on March 12th 2019

Reviewed May 2024

This policy applies to all records created, received or maintained by Hesket 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 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 in the course 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 and to take account of the different retention periods when creating new record keeping systems.

Disposal procedures:

All documents that are no longer required for administrative reasons should be shredded and disposed of.

Retention of Documents Schedule

Document	Minimum Retention Period	Reason
Minutes of Meetings	Indefinite	Archive <i>(To be passed to archive at Cumbria Archive Centre (Carlisle) after a period of ten years)</i>
Annual Accounts	Indefinite	Archive <i>(To be passed to archive at Cumbria Archive Centre (Carlisle) after a period of ten years)</i>
Annual Return	Indefinite	Archive <i>(To be passed to archive at Cumbria Archive Centre (Carlisle) after a period of ten years)</i>
Bank statements, cheque book stubs and paying in books	2 years	Audit/Management
Quotations and tenders	7 years	Audit
Paid Invoices and VAT records	7 years	Audit/VAT
Salary, Tax and NI records	7 years	Audit
Insurance policies	Whilst valid	Audit
Certificate of Employers Liability	40 years	Audit/legal
Certificate of Public Liability	40 years	Audit/legal
Assets register, deeds and leases	Indefinite	Audit
Declarations of Office and Members register of interests	Term of Office + 1 year	Management
Complaints	1 year	Management
General Information	3 months	Management <i>(To be passed to archive at Cumbria Archive Centre (Carlisle) after a period of ten years)</i>
Routine correspondence and emails	5 years	Management <i>(To be passed to archive at Cumbria Archive Centre (Carlisle) after a period of ten years)</i>
Planning decision notices	5 years	Management