



POLICY	RETENTION
VERSION	1.2
LAST REVIEWED	16 May 2023

1 Policy statement

- 1.1 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.
- 1.2 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.

2 Responsibilities

- 2.1 The Parish Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. The Clerk has overall responsibility for the implementation of this policy and is required to manage compliance.
- 2.2 The Clerk must ensure that the records are accurate and are maintained and disposed of in accordance with the Parish Council's records management guidelines so that information can be retrieved easily, appropriately and in a timely manner.
- 2.3 Individual Councillors should ensure that any records, in hard copy format or electronic, which are important in the context of the Parish Council's records, are provided to the Clerk for the official record. Individual Councillors are strongly advised to undertake "weeding" and "housekeeping" on a regular basis. On resigning from Council Councillors must delete any electronic records they hold and destroy hard copy documents.
- 2.4 Disposal procedures: all paper documents that are no longer required should be shredded for disposal.
- 2.5 Electronic data: all electronic data which is no longer required should be deleted and in accordance with GDPR.
In accordance with Bradwell Parish Councils Retention Schedule 'routine correspondence and emails' shall be retained for six (number: 6) months.

3 Retention Schedule

- 3.1 The Freedom of Information Act 2000, requires the Parish Council to maintain a retention schedule listing the record series created in the course of its business. This lays down the retention period and action to be taken when the records are of no further use. This process is managed by the Clerk.

Retention schedule

Document	Minimum retention period	Reason
Minute Books	Indefinite	Archive
Scales of fees and charges	5 years	Management
Receipt & Payment (or income & expenditure) Accounts	Indefinite	Archive
Receipt books of all kinds	6 years	VAT
Bank statements, including deposit/savings accounts	Last completed audit year	Audit
Bank paying-in books	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Quotations and tenders	12 years/indefinite	Statute of Limitations
VAT Invoices and records	6 years	VAT
Petty cash, postage & telephone books	6 years	Tax, VAT, Statute of Limitations
Timesheets	Last completed audit year	Audit
Wages books	12 years	Superannuation
Insurance policies	While valid	Management
Investments	Indefinite	Audit, management
Title deeds, leases, agreements, contracts	Indefinite	Audit management
Members allowance register	6 years	Tax, Statute of Limitations
For halls, centres and Recreation grounds - Application to hire - Letting diaries - Copies of bills to hirers - Record of tickets issued	6 years	VAT
Declarations of acceptance	Term of office + 4 years	Management
Members register of interests' book	Term of office + 4 years	Management
Complaints	2 years	Management
General information	3 months	Management
Routine correspondence & e-mails	6 months	Management
Planning applications	None	Held by PDNPA. Recommendations are stored within Minutes, correspondence as above