

RECORD RETENTION POLICY

The Parish Council recognises that 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.

Scope

Applies to all records (electronic or paper) created, received, or maintained by the Council. 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. Some records may be selected for permanent archival purposes and for historical research.

Responsibilities

- Clerk: Overall policy responsibility
- Records Officer (Clerk): Guidance, compliance, and retrieval
- Councillors/Staff: Maintain and dispose of records in accordance with policy

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 during 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.

Document	Minimum Retention	Reason
Minutes		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
Employment		
Staff contracts	6 years after leaving	Management
Payroll info	6 years + current year	HMRC
References	6 years after leaving	Management
Application forms – unsuccessful	6 months	Management
Application forms – successful	6 years after leaving	Management
Disciplinary files	6 years after leaving	Management

Appraisals	6 years after leaving	Management
Finance		
Scales of fees	6 years	Management
Receipt & payment accounts	Indefinite	Archive / historical
Bank statements	Last completed audit year	Audit
Cheque stubs	Last completed audit year	Audit
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980
Petty cash	6 years	VAT
Insurance		
Insurance policies	6 years after policy end	Management
Employee liability certificates	6 years after policy end	Management
Public liability certificates	6 years after policy end	Management
Health & Safety		
Accident books	3 years	Statutory
Risk assessments	3 years	Management
General Management		
Councillor contact details	Duration of membership	Management
Lease agreements	12 years	Limitation Act 1980
Contracts	6 years	Limitation Act 1980
Emails	End of useful life	Management
Consent forms	5 years	Management
GDPR compliance forms	Duration of membership	Management
GDPR resignation checklist	1 year after resignation	Management

** The council's accounts are a rich source of social history information and should be archived indefinitely wherever practical to do so.*

Approved by Holcot Parish Council: Signed Copy Held By Clerk		
Signature of Chair		Date: 16th February 2026
Signature of Clerk		Date: 16th February 2026

Version number	Purpose/change	Author	Date	Minute Ref
0.1	Initial draft	LSS	20/02/18	
0.2	Amend retention times	LSS	17/05/18	
0.3	Amend receipts information and add resignation record	LSS	08/01/19	
1	Adopted	RC	20/11/23	23/225
2	Updated	RC	16/022026	