

*STONELEIGH AND ASHOW*

*JOINT PARISH COUNCIL*

*POLICY STATEMENT Retention of Documents*

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.

The Parish Council recognises its responsibility to comply with the Data Protection Act 1998 and the General Data Protection Regulations, May 2018

The acts regulate the use of personal data. This does not have to be sensitive data; it can be as little as a name and address.

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.

The Parish Council has a 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 he/she 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. Any records that are held on the Parish Council's computer will be backed up regularly to a hard drive by the Clerk.

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. This retention schedule refers to record series regardless of the media in which they are stored.

## Retention of Documents

Document	Minimum Retention	Reason	Disposal
Minute Books	Indefinite	Archive	Archived every 5 years with Higher Authority
Agendas	5 years	Management	Bin (shred confidential waste)
Accident reports	20 years	Potential claims	Confidential waste
Annual Accounts	Indefinite	Archive	n/a
Annual Return	Indefinite	Archive	n/a
Bank statements	Last completed audit year	Audit	Confidential waste
Cheque book stubs	Last completed audit year	Audit	Confidential waste
Paying in books	Last completed audit year	Audit	Confidential waste
Quotations	6 years	Limitation Act 1980	Confidential waste
Paid invoices	6 years	Audit	Confidential waste
VAT records	6 years	VAT	Confidential waste
Salary records	12 years	Audit	Confidential waste
Tax & NI records	7 years	Audit	Confidential waste
Insurance policies	Whilst valid	Management	Bin
Insurance company	Indefinite	Management	N/A
Contact details			
Cert of Employers Liability	40 years	Audit/legal	Bin
Cert of public liability	40 years	Audit/legal	Bin
Assets register	Indefinite	Audit	Confidential waste
Declarations of	Term of Office + 1 year	Management	Confidential waste
Members register of	Term of Office + 1 year	Management	Confidential waste
Of interests			
Complaints	1 year	Management	Confidential waste
Routine correspondence	6 months	Management	Confidential waste
Including emails			

## Planning Applications

All planning applications and relevant decision notices are available at Warwick District Council. There is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the Council minutes and are retained indefinitely.

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

This Policy was adopted at the Council meeting on 9<sup>th</sup> May 2019 and will be reviewed when appropriate, and within 5 years.