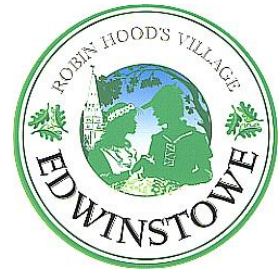


Edwinstowe Parish Council

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Retention of Documents Policy

The Retention of Documents Policy was adopted at the Council meeting on 12th June 2024 under minute reference 24/35(vi)0

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.

This document provides the policy framework through which this effective management can be achieved and audited. It covers:

Scope Responsibilities Retention Schedule Scope of the Policy

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 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.

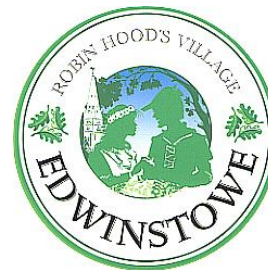
Retention Schedule

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

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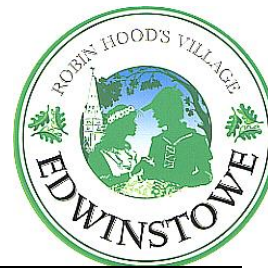


Retention of Documents

Document	Minimum Retention	Reason
Minutes	Indefinite	Archive
Agendas	Until Draft Minutes Approved	Management
Draft Minutes	Until Minutes Approved	Management
Annual Return	Indefinite	Archive
Bank Statements	6 Years	Audit/Management
Cheque Book Stubs	Last Completed Audit	Management
Paying-in Books	Last Completed Audit	Management
Quotations (successful)	12 Years	Limitation Act 1980
Quotations (unsuccessful)	2 Years	Operational
Paid Invoices	6 Years	Audit/VAT
VAT Records	6 Years	Audit/VAT
Personnel Files	6 years plus 6 years for summary for non-management staff. 12 years after termination of service	Management
Salary Records	12 Years	Audit
Tax & NI Records	6 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	Once superseded by a new asset register	Audit
Deeds/Leases	Until there is no longer an administrative requirement	Audit
Declarations of Acceptance of Office	Term of Office or until they vacate office	Management
Register of Members Interests	Term of Office or until they vacate office	Management
General Correspondence	Until there is no longer an administrative requirement	Management
Complaints	Until there is no longer an administrative requirement	Management

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General Information	Until there is no longer an administrative requirement	Management
Emails	Until there is no longer an administrative requirement	Management
Electronic Information	Until there is no longer an administrative requirement	Management
Recruitment Data	Successful – 9 months after recruitment finalised Unsuccessful – 1 year after recruitment finalised plus current year	Sex Discrimination Acts 1975 & 1986, Race Relations Act 1976, Disability Discrimination Act 1995, Employment Equality (Sexual Orientation) Regulations, Employment Equality (Religion or Belief) Regulations

Planning Applications

All planning applications and relevant decision notices are available at N&SDC. 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. Correspondence received in connection with applications will be retained as stated below.

Disposal procedures: all documents that are no longer required for administrative reasons should be shredded and disposed of or sent to Recycling Ollerton & Boughton for confidential shredding.