

Pilning & Severn Beach Parish Council

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Document Control

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Retention of Documents Policy

Introduction

Pilning & Severn Beach 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 effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Relationships with existing policies
- Retention Schedule

Scope of the policy

This policy applies to all records created, received or maintained by the Parish Council while 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 this policy is the Clerk.

The Clerk will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely fashion. The Parish Council will only keep data for as long as it is necessary to do so.



Relationship with existing policies

This policy has been drawn up within the context of:

- Freedom of Information policy
- General Privacy Notice
- Privacy Notice
- Publication Scheme
- and with other legislation or regulations (including audit and Statute of Limitations) affecting the Parish Council.

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.

Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems.

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

Planning Applications

All planning applications and relevant decision notices are available from South Gloucestershire 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. Correspondence received in connection with applications will be retained as stated below.

List of Documents

Retention of Documents Schedule

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

Document	Minimum Retention	Reason
Minute Books	Indefinite	Archive
Annual Accounts	Indefinite	Archive
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	6 years	Audit
Paid invoices	6 years	Audit/VAT
VAT records	6 years	Audit/VAT
Salary records	6 years	Audit
Tax & NI records	6 years	Audit

Insurance policies	Whilst valid	Audit
Cert of Employers Liability	40 years	Audit/legal
Cert of public liability	40 years	Audit/legal
Assets register	Indefinite	Audit
Deeds, leases	Indefinite	Audit
Declarations of acceptance	Term of Office	Management
Members register of interests' book	Term of Office	Management
Complaints	1 year	Management
General information	3 months	Management
Routine correspondence & emails	6 months	Management