

# **Records Retention Policy**

## **Piddle Valley Parish Council**

Piddle Valley 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 council. This document provides the policy framework through which this effective management can be achieved and audited.

It covers:

- Scope
- Responsibilities
- Retention Schedule

### Scope

This policy applies to all records created, received or maintained by Piddle Valley Parish Council and representatives working on their behalf in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Piddle Valley 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 Piddle Valley Parish Council records may be selected for permanent preservation as part of the Councils archives and for historical research.

### Responsibilities

Piddle Valley 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 person responsible for records management will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and timely. Individual staff and employees must ensure that records for which they are responsible are accurate and are maintained and disposed of in accordance with Piddle Valley Parish Council's records management guidelines.

## Retention Schedule

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

Document	Minimum Retention Period	Reason
<b>Minutes</b>		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
<b>Employment</b>		
Staff employment contracts	6 years after ceasing employment	Management
Staff payroll information	3 years	Management
Staff references	6 years after ceasing employment	Management
Application forms (interviewed – unsuccessful)	6 months	Management
Application forms (interviewed – successful)	6 years after ceasing employment	Management
Disciplinary files	6 years after ceasing employment	Management
Staff appraisals	6 years after ceasing employment	Management
<b>Finance</b>		
Scales of fees and charges	6 years	Management
Receipt and payment accounts	Indefinite	Archive
Bank statements	7 years	Audit
Cheque book stubs	7 year	Audit
Paid invoices	7 years	VAT
Paid cheques	7 years	Limitation Act 1980
Payroll records	6 years + current year	HMRC
<b>Insurance</b>		
Insurance policies	7 years after policy end	Management
Certificates for Insurance against liability for employees	7 years after policy end	Management
Certificates for Public Liability	7 years after policy end	Management
Insurance claim records	7 years after policy end	Management
<b>Health and Safety</b>		
Accident books	3 years from date of last entry	Statutory
Risk assessment	3 years	Management
<b>General Management</b>		
Councillors contact details	Duration of appointment	Management
Lease agreements	As long as necessary	Limitation Act 1980
Contracts	6 years	Limitation Act 1980
Email messages	5 years	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management

Version number	Purpose/change	Author	Date
0.1	Initial draft	LSS	20/2/18
0.2	Amend retention times	LSS	17/05/18
0.3	For use by PVPC	Chair PVPC	21/07/18

Next review date: April 2019