

## DOCUMENT RETENTION POLICY

Burton Green 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.

### SCOPE OF THE POLICY

This policy applies to all records created, received or maintained by the Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the 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.

### RESPONSIBILITIES

The 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 to the Council.

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 timely.

Individual staff and employees must ensure that records for which they are responsible are accurate, maintained and disposed of in accordance with the Council's records management guidelines.

### RELATIONSHIP WITH EXISTING POLICIES

This policy has been drawn up within the context of the Council's Data Protection policy.

### RETENTION SCHEDULE

Under the Freedom of Information Act 2000, Burton Green 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.

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.

Document	Minimum retention period	Reason
Signed minutes of council meetings (signed hard copy)	Indefinite	Archive
Policies (signed hard copy)	6 years	Limitation Act 1980 (as amended)
Annual Governance & Accountability Return	Indefinite	Archive
<b>Financial</b>		
Yearly accounts	Indefinite	Archive

Bank statements	Last completed audit year	Audit
Bank paying-in books	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Bank mandates	For the duration of the account	Audit
Quotations and tenders	6 years	Limitation Act 1980 (as amended)
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980 (as amended)
VAT records	6 years	VAT
Investments	Indefinite	Audit, Management
Grant Applications to the Council	5 years	Management
Grant Applications on behalf of the Council	5 years	Management
Insurance policies	While valid	Management
Certificates for insurance: <ul style="list-style-type: none"> <li>Employer's Liability</li> <li>Public Liability</li> </ul>	40 years from date from when insurance commenced or was renewed	The Employer's Liability (Compulsory Insurance) Regulations 1998 (SI. 2753), Management
<b>Employment</b>		
Timesheets	Last completed audit year	Audit
Payroll	6 years + current accounting year	As per HMRC's Records management and retention and disposal Policy
Pension records	6 years after employment ends	
HR records: job application forms, employment contract, sickness records	6 years after employment ends	Required by the Limitation Act 1980
Annual leave records	2 years	As per HMRC's Records management and retention and disposal Policy
<b>Health and Safety</b>		
Accident books	25 years from closure	Management
Health & Safety Inspection Records	6 years	Limitation Act 1980
Annual playground inspection records	21 years	Limitation Act 1980
Risk assessment	3 years from last assessment	Management
<b>Members</b>		
Members Acceptance of Office	Term of Office	
Members Declaration of Interests	18 months after individual ceases to be a Member	Management
<b>Miscellaneous</b>		
Title deeds & leases	Indefinite	Audit, Management
Complaints	5 yrs after closure of case	Management
Press releases	6 years	Management

Public consultation - survey and returns	5 years	Management
Reports, newsletters etc	Retain as long as useful	Management
<b>Documentation for Legal purposes (unless extended by action)</b>		
Negligence	6 yrs	Limitation Act 1980 (as amended)
Defamation	1 yr	Limitation Act 1980 (as amended)
Contract	6 yrs	Limitation Act 1980 (as amended)
Sums recoverable	6 yrs	Limitation Act 1980 (as amended)
Leases	12 yrs	Limitation Act 1980 (as amended)
Personal injury	3 yrs	Limitation Act 1980 (as amended)
To recover land	12 yrs	Limitation Act 1980 (as amended)
Rent	6 yrs	Limitation Act 1980 (as amended)
Breach of Trust	None	Limitation Act 1980 (as amended)

**Signed (Chair):** Cllr McColl

**Date:** 23<sup>rd</sup> February 2026

**Date for next review:** Feb 2027