

HOLFORD PARISH COUNCIL Records Retention Policy.

Retention of Documents Policy The Retention of Documents Policy was adopted at the Council meeting on 14th September 2020.

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:

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, who 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.

The Clerk must ensure that the records for which they are responsible are accurate and are maintained and disposed of in accordance with the Parish Council's records management guidelines.

Individual Councillors may hold records in hard copy format or electronically at home or on their home computers. If a Councillor considers that some of these documents are important in the context of the Parish Council's records, they should ensure that the Clerk retain a copy for the official record.

Individual Councillors are strongly advised to undertake "weeding" and "housekeeping" on a regular basis.

On resigning from the Council Councillors should delete electronic records they hold and destroy hard copy documents.

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.

Retention of Documents:

Document	Retention	Reason
Minutes	Indefinite	Archive
Annual Accounts	Indefinite	Archive
Annual Returns	Indefinite	Archive
Bank statements	7 years	Audit
Quotations & tenders	7 years	Audit
Paid invoices	7 years	Audit
Salary records	7 years	Audit
Tax and NI records	7 years	Audit
Insurance policies	Whilst valid	Audit
Assets register	Indefinite	Audit
Deeds	Indefinite	Audit
Declarations of acceptance	Term of office + 4 years	Management
Members register of interests	Term of office + 4 years	Management
Complaints	2 years	Management
General information	6 months	Management
Routine correspondence & emails	6 months	Management
Planning correspondence	Application/Appeal decision made	Management

Planning Applications:

All planning applications and relevant decision notices are available at Somerset West and Taunton Dean. 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.

Disposal procedures: all documents that are no longer required for administrative reasons should be shredded and disposed of.