



Congresbury Parish Council

Retention and Disposal Policy

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| Date of adoption by Parish Council | 16 th March 2026 | Next review date | March 2028 |
| Signature of Chairman of Parish Council | | Policy Reference | POL-033 |

1.Introduction

Congresbury Parish Council recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations (General Data and to contribute to the effective overall management of the association. This document provides the policy framework through which this effective management can be achieved and audited.

It covers:

- Scope
- Responsibilities
- Retention Schedule

2.Scope

This policy applies to all records created, received or maintained by Congresbury Parish Council while carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Congresbury 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 Congresbury Parish Council records may be selected for permanent preservation as part of the Councils archives and for historical research.

3.Responsibilities

Congresbury 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 and proper officer to Congresbury parish Council.

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 Councillors may hold records in hard copy format or electronically at home or on their home computers. If the Councillor considers that some of these documents are important in the context of the parish records, they should ensure that the Clerk retain a copy for the official record. Individual councillors are strongly advised to undertaking “weeding” and “housekeeping” on a regular basis. On resigning from the council councillors should delete electronic records they hold and destroy hard copy documents. Councillors should be aware that records that they hold may be subject to the provisions of the Data Protection Act 1998, Freedom of Information Act 2000 and Environmental Information regulations 2004, Localism Act 2011 and the General Data Protection Regulations 2018.

4.Retention Schedule

Congresbury Parish Council is required to maintain a retention schedule listing types of records which it creates or holds 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. The Clerk will be expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when he/she is 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 |
|--|----------------------------------|---------------|
| | | |
| Minutes | | |
| Minutes of Council meetings | Indefinite | Archive |
| Minutes of committee meetings | Indefinite | Archive |
| | | |
| Employment | | |
| 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 maximum (destroy) | 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 |
| | | |
| Finance and Payroll | | |
| Scales of fees and charges | 6 years | Management |
| Receipt and payment accounts | Indefinite | Archive |
| Bank statements | Last completed audit year | Audit |

| | | |
|--|---------------------------------|---|
| Cheque book stubs/Paying in Books | Last completed audit year | Audit |
| Paid invoices | 6 years | VAT |
| Paid cheques | 6 years | Limitation Act 1980 |
| Payroll records | 6 years + current year | HMRC |
| Petty cash accounts | 6 years | VAT |
| Annual Return and Audited Accounts | Indefinite | Archive |
| | | |
| Insurance | | |
| Insurance policies | 6 years after policy end | Management |
| Certificates for Insurance against liability for employees | 6 years after policy end | Management |
| Certificates for Public Liability | 6 years after policy end | Management |
| Insurance claim records | 6 years after policy end | Management |
| | | |
| Health and Safety | | |
| Accident books | 3 years from date of last entry | Statutory |
| Risk assessment | 3 years | Management |
| Play equipment inspection reports | 21 years | Insurance claims |
| | | |
| General Management | | |
| Councillors contact details | Duration of membership | Management |
| Lease agreements | 12 years | Limitation Act 1980 |
| Contracts | 6 years | Limitation Act 1980 |
| Email messages | At end of useful life | Management |
| Consent forms | 5 years | Management |
| GDPR Security Compliance form | Duration of membership | Management |
| Correspondence, emails and papers on important local issues and activities | Indefinite | Archive |
| Routine correspondence, emails and papers | 1 year | Management |
| | | |
| Burial Grounds | | |
| | | |
| Register of Burials | Indefinite | Archives Local Authority Cemeteries Order 1977 |
| Register of purchased graves | Indefinite | |
| Register of memorials | Indefinite | |
| Register/Plan of Grave Spaces | Indefinite | |
| Correspondence for all interments and memorials | Indefinite | |
| Certificates of grant of exclusive right of burial | Indefinite | |

General correspondence will be retained if relevant, the minimum period is one year. An annual review of all documentation should be carried out and items that have reached their deletion or destruction date being deleted/destroyed and the remainder being considered for archiving.

All records are kept at the Parish Office or archived to the

Somerset Records Office

Somerset Heritage Centre,

Brunel Way,

Norton Fitzwarren,

Taunton,

TA2 6SF

01823 278805 (Enquiries) 01823 337600 (Appointments)

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