


# Congresbury Parish Council

## Retention and Disposal Policy

Date of adoption by Parish Council	11 <sup>th</sup> November 2024	Next review date	November 2025
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 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. 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.

<b>Document</b>	<b>Minimum Retention Period</b>	<b>Reason</b>
<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 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
<b>Finance and Payroll</b>		
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
<b>Insurance</b>		
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
<b>Health and Safety</b>		
Accident books	3 years from date of last entry	Statutory
Risk assessment	3 years	Management
Play equipment inspection reports	21 years	Insurance claims
<b>General Management</b>		
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
<b>Burial Grounds</b>		
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

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