

WINGHAM PARISH COUNCIL

RETENTION AND DISPOSAL OF DOCUMENTS POLICY

Wingham 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. Please also refer to the Council's Data Map which lists all information collected and stored by the Parish Council.

Scope of the policy

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 number 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, and they are required to manage the Council's records in such a way as to promote compliance with this policy so that information can 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 appropriately.

Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the records which it creates. 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. **See Appendix A.**

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 records regardless of the media in which they are stored.

Destruction of documents will be undertaken in accordance with this Policy to avoid any inference that a document was destroyed in anticipation of a problem.

Appendix A: Document Retention and Disposal Schedule

Document	Minimum Retention Period	Reason	Disposal
Accident/incident book reports	3 years	Reporting of injuries, potential claims, Diseases & Dangerous Occurrences Act 2013	Confidential waste/delete from server
Allotment register & plans	Indefinite	Audit, management	-
Bank paying in books	Last competed audit year	Audit	Confidential waste
Bank statements including savings/deposit accounts	Last competed audit year	Audit	Confidential waste/delete from server
Cheque book stubs	Last competed audit year	Audit	Confidential waste
Contact details for village groups, emergency plan, etc	Whilst valid	Reference	Confidential waste/delete from server
Correspondence (general) & emails	1 year Unless it relates to specific categories in this policy then it should be kept as long as needed to comply with regulatory requirements	Management, Limitation Act 1980 (as amended)	Confidential waste/delete from server
Disclosable Pecuniary Interest forms	6 years	Limitation Act 1990 (as amended)	Confidential waste/delete from server
Electoral Register (to use for polls only)	One Year	Reference/legal obligation	Electronic only – delete once new register received
Information from other bodies; eg KALC, NALC, principal authorities	Retained for as long as useful and relevant		Bin
Insurance Certificate against liability for employees	Indefinitely	Future claims	-

Document	Minimum Retention Period	Reason	Disposal
Insurance company names & policy numbers	Indefinite	Management	-
Insurance Policies	While valid	Management	Bin
Magazines, journals and press items	Retained for as long as is useful and relevant		Bin
Meeting attendance register	Indefinite	Archive	-
Members allowances register	6 years	Tax, Limitation Act 1980 (as amended)	Confidential waste
Minutes	Indefinite	Archive	Original signed minutes must be kept indefinitely and archived regularly with the higher authority
Nominations for community awards, etc	1 year	Management	Confidential waste/delete from server
Online meeting recordings	Until minutes approved	Management	Delete recordings from server
Paid cheques	6 years	Limitation Act 1980 (as amended)	Confidential waste
Paid Invoices	6 years	VAT	Confidential waste
Park equipment inspections and Annual Report	5 years	Management, potential claims	Bin
Personnel (including staff, members & volunteers) records including contacts, applications, references, etc	6 years	Limitation Act 1980 (as amended)	Confidential waste/delete from server
Petty Cash & postage books	6 years	VAT, Tax, Limitation Act 1980 (as amended)	Confidential waste
Photos	Whilst useful & relevant	-	Delete from server

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Document	Minimum Retention Period	Reason	Disposal
Planning: <ul style="list-style-type: none"> • Applications & Appeals • Trees • Local Development Plan 	<ul style="list-style-type: none"> • One year unless significant ongoing development • One year • Retained for as long as in force 	<ul style="list-style-type: none"> • Management • Reference/Management • Reference 	<ul style="list-style-type: none"> • Bin • Bin • Bin
Quotations & tenders	6 years after completion of contract	Limitation Act 1980 (as amended)	Confidential waste/delete from server
Receipt & payment accounts	Indefinite	Archive	-
Receipt books of all kinds	6 years	VAT	Confidential waste
Scale of fees & charges	6 years	Management	Bin
Surveys & Questionnaires	1 year	Reference	Confidential waste/delete from server
Timesheets	Last completed audit year	Audit	Bin
Title deeds, leases, agreements, contracts	Indefinite	Audit, management	-
Trees local survey & maintenance record	Retained for as long as relevant	Management, reference	Bin
VAT records, P60s & P45s	6 years	VAT, Tax	Confidential waste/delete from server
Wages payroll & pension records	12 years	Superannuation	Confidential waste/delete from server