# Records Retention Policy

## Little Longstone Parish Meeting

*Version 1.0 - Draft for adoption at the assembly to be held on 26th August 2026.*
*Replaces the retention policy of November 2018.*

> ***How to use this policy:*** *This policy explains how Little Longstone Parish Meeting manages its records throughout their life, including how long different records are retained, when records are reviewed for permanent preservation, and when they may be securely destroyed. It should be read alongside the Parish Meeting's Privacy Policy, Data Protection Policy and Freedom of Information Publication Scheme.*

## 1. Purpose and scope

**1.1** Effective records management supports good governance, accountability, continuity and compliance with legal obligations. This policy applies to all records created, received or maintained by the Parish Meeting in the course of its functions, whether held on paper or electronically, including correspondence and email.

**1.2** Records will not be destroyed solely because a minimum retention period has expired. Where a record may have continuing legal, evidential, governance, administrative or historical value, it will be reviewed and may be selected for permanent preservation.

**1.3** The value of a record depends principally on its content and context, not its format. Correspondence, emails, photographs, plans, invoices or other apparently routine records may therefore be retained where they provide significant evidence of the Parish Meeting's decisions, activities, rights, responsibilities or history.

**1.4** The Parish Meeting recognises that, because many matters arise only occasionally, older correspondence may have continuing administrative and evidential value. A searchable history of correspondence can provide important organisational memory and assist future office-holders in identifying previous contacts, decisions and actions.

**1.5** The Parish Meeting will take a proportionate approach to managing email and other high-volume correspondence. It is not necessary routinely to review and delete individual messages solely because of their age where doing so would impose a disproportionate administrative burden or create a material risk of destroying records of continuing value. Clearly transitory, duplicate or unnecessary material may be deleted when convenient.

**1.6** Records of enduring value will be preserved permanently. These may include minutes, constitutional records, significant governance records, records concerning land and property, important agreements and legal rights, and selected correspondence or other material documenting matters of lasting significance to the Parish Meeting or community.

**1.7** Permanent preservation does not require the Parish Meeting to retain unnecessary personal information. Records selected for long-term preservation will be managed in accordance with data protection law, and unnecessary or duplicated personal information may be removed where appropriate without destroying the evidential or historical value of the record.

**1.8** At the end of a specified retention period, a record will normally have one of three outcomes: **Destroy**, where it has no continuing value; **Review**, to decide whether it should be destroyed, retained for a further period or preserved permanently; or **Permanent**, where it has enduring value and is retained permanently or transferred to appropriate archival custody.

**1.9** Records selected for permanent preservation should be kept in suitable long-term storage and, where appropriate, may be transferred to an appropriate archive or record office. Permanent records should not depend solely on an individual office-holder's personal files, email account or equipment.

## 2. Responsibilities

**2.1** The Clerk has day-to-day responsibility for the management of the Parish Meeting's records, including their organisation, security, accessibility, retention, review, permanent preservation and secure disposal where appropriate.

**2.2** Official Parish Meeting records should, so far as practicable, be held in corporate filing, email or storage arrangements rather than solely in the personal accounts, files or equipment of an individual office-holder. Arrangements should allow appropriate access and continuity if the Clerk or another person responsible for records becomes unavailable.

**2.3** Records should be organised, where practicable, by subject or function so that related material can be located together. Important correspondence and other records should be associated with the relevant subject, property, contract, project or governance matter where this assists future retrieval.

**2.4** Email and other high-volume correspondence will be managed proportionately. Routine deletion or manual review of individual messages solely because of their age is not required where this would impose a disproportionate administrative burden or create a material risk of destroying records of continuing value. Clearly transitory, duplicate or unnecessary material may be deleted when convenient.

**2.5** Records of significant or permanent value should, where practicable, be identified and retained with the relevant subject or permanent records rather than relying solely on their continued availability within an email account.

**2.6** Records should be destroyed only where the retention schedule permits this and there is no continuing legal, administrative, evidential or historical reason to retain them. Records containing confidential or personal information must be disposed of securely, including confidential destruction of paper records and appropriate deletion of electronic records.

**2.7** A record must not be destroyed while it is relevant to an ongoing or reasonably anticipated legal proceeding, audit, complaint, investigation, information request or other matter for which it may be required, even if its normal retention period has expired.

**2.8** Records selected for permanent preservation should be maintained in suitable long-term storage. The Clerk should periodically consider whether older permanent records would be better preserved by transfer to an appropriate archive or record office, while retaining access or copies where reasonably required for Parish Meeting purposes.

## 3. Retention schedule

**3.1** The schedule below sets minimum retention periods or review points. A minimum retention period is not an instruction to destroy a record when that period expires. The principles in sections 1 and 2 must be applied before destruction, including consideration of any continuing administrative, legal, evidential, governance or historical value.

**3.2** Where records concerning the same matter fall into different categories, they should normally be managed according to the category which best reflects their subject and continuing value. In particular, correspondence should not be treated as “general correspondence” merely because it was sent by email or letter.

| Record | Minimum retention / review point | Action |
|---|---|---|
| **Governance and meetings** | | |
| Minutes of assemblies | Permanent | Retain permanently. |
| Agendas and significant supporting papers | 6 years, then review | Preserve permanently where they provide significant context to decisions or matters of enduring importance; otherwise may be destroyed after review. |

| Record | Minimum retention / review point | Action |
|---|---|---|
| Standing Orders, Financial Regulations, Code of Conduct and other governance policies | Current version while in force; superseded versions review after 6 years | Preserve a representative record of significant former governance arrangements and versions of enduring evidential or historical value. Other superseded copies may be destroyed. |
| Risk Management Policy and Risk Registers | Current while in force; superseded versions review after 6 years | Preserve versions documenting significant risks, events or changes in governance; otherwise destroy after review. |
| Registers and formal governance records not covered elsewhere | While current; review superseded records after 6 years | Preserve permanently where they form part of the enduring governance record; otherwise destroy after review. |
| **Finance and audit** | | |
| Annual Governance and Accountability Returns, annual accounts and final internal/external audit reports | Permanent | Preserve the final annual accounts, AGAR and final internal/external audit reports permanently as part of the Parish Meeting's financial and governance record. |
| Cashbooks or equivalent principal accounting records | 6 years plus current year, then review | Consider permanent preservation of year-end or principal accounting records; otherwise destroy after review. |
| Invoices, receipts, payment records, bank statements and cheque records | 6 years plus current year, or longer where required | Normally destroy after the retention period unless relevant to a matter of continuing evidential or historical value. |
| Budgets and budget-monitoring reports | 6 years, then review | Preserve significant annual/final records where they provide useful financial history; otherwise destroy after review. |
| Bank reconciliations and financial verification records | 6 years | Normally destroy unless required for an ongoing matter. |
| Asset Register | Current version permanently; superseded versions review | Preserve versions recording significant acquisition, disposal or changes to LLPM's assets; routine intermediate versions may be destroyed. |
| **Land, property and legal** | | |
| Title deeds, conveyances, orders, declarations, plans, byelaws and other primary evidence of ownership, rights or obligations | Permanent | Preserve permanently. |
| Records concerning the acquisition, ownership, occupation, boundaries, use, management, maintenance or disposal of land and significant assets | Permanent or long-term review as appropriate | Preserve records providing material evidence of LLPM's rights, responsibilities, occupation, management or historical involvement. |
| Significant correspondence concerning land, property or assets | Permanent where of evidential value | Preserve where it may provide evidence of ownership, occupation, maintenance, rights, responsibilities, agreements or the history of the property. |
| Legal advice and case files concerning land, title, rights or other matters of enduring significance | Review after the matter concludes; normally permanent where continuing evidential value exists | Do not destroy without considering continuing legal and evidential value and, where appropriate, obtaining legal advice. |
| Other legal case files | Matter concluded + 6 years, then review | Destroy only where there is no continuing legal, evidential, governance or historical value. |

| Record | Minimum retention / review point | Action |
|---|---|---|
| **Contracts, licences and procurement** | | |
| Registers of contracts, licences or commercial arrangements | Current permanently; superseded records review | Preserve records necessary to establish the history of significant commercial arrangements. |
| Executed contracts, leases, licences and agreements | Duration of agreement + 6 years minimum, then review | Preserve permanently where connected with land, significant assets, important rights or arrangements of enduring evidential or historical value. |
| Tender and procurement records, including successful and unsuccessful submissions | 6 years after completion, then review | Routine material may be destroyed; preserve records of significant procurement or commercial arrangements where they provide enduring evidence of the decision or management of an asset. |
| Significant correspondence relating to contracts, licences or commercial arrangements | Retain with the relevant subject record | Apply the retention outcome appropriate to the underlying arrangement rather than treating it as general correspondence. |
| **Complaints, information rights and data protection** | | |
| Complaints register | Permanent | Maintain an enduring record of complaints and outcomes, containing only the personal information necessary for that purpose. |
| Individual complaint files | 6 years after closure, then review | Normally destroy unnecessary case material; preserve material where the complaint has enduring governance, legal or historical significance. |
| FOIA/EIR request log | 6 years, then review | Consider retaining an enduring summary record; routine case details may be destroyed. |
| FOIA/EIR requests and responses | 3 years after completion, then review | Destroy routine cases; preserve significant decisions or disclosures where they provide useful precedent or governance history. |
| Data-subject rights requests | 3 years after completion | Normally destroy unless relevant to an ongoing matter or significant compliance issue. |
| Personal-data breach register | Permanent | Maintain sufficient record to demonstrate compliance; review supporting case material after 6 years. |
| Detailed personal-data breach files | 6 years after closure, then review | Destroy where no longer necessary unless the incident has continuing legal or governance significance. |
| **Insurance** | | |
| Insurance policies, schedules and renewal records | 6 years after expiry, then review | Preserve older policies where they may evidence historic cover relevant to long-tail claims; otherwise destroy. |
| Liability insurance certificates and records of cover | Permanent | Preserve because claims may arise many years later. |
| Claims and significant insurance correspondence | Claim closed + 6 years minimum, then review | Preserve where there may be continuing liability or evidential value. |
| **Clerk and other office-holder records** | | |
| Clerk's contract or terms of appointment and significant engagement records | Engagement ends + 6 years, then review | Normally destroy personal material after the retention period; preserve records necessary to document the history of the office or significant governance matters. |
| Payroll, remuneration, invoices and related financial records | 6 years plus current year, or longer where required | Normally destroy securely after the retention period. |

| Record | Minimum retention / review point | Action |
|---|---|---|
| Records relating to Chair, Vice Chair or other office-holders | While current, then review | Preserve formal appointment, office and significant governance records; destroy unnecessary personal/contact information. |
| **General correspondence and email** | | |
| General correspondence and email not forming part of another record category | No fixed automatic deletion period | Retain while it has continuing administrative, evidential, governance or historical value. Routine deletion by age alone is not required. Clearly ephemeral, duplicate or unnecessary material may be deleted when convenient. Significant correspondence should be retained with the relevant subject record where practicable. |
| **Photographs, maps and historical material** | | |
| Photographs, maps, plans, surveys and other records documenting LLPM's assets, activities or the parish | Review for enduring value | Preserve permanently where they provide significant evidential, administrative or historical information. |

## 4. Resolution of Adoption and Review

Date of policy: August 2026
Approving body: Little Longstone Parish Meeting
Date of Assembly and Minute Reference: 26th August 2026 – **MINUTE REF TO BE ADDED**
Policy version reference: 1.0
Policy effective from: 26th August 2026
Next review due: May 2027