

# **GREAT LONGSTONE PARISH COUNCIL**

## **Records Retention policy**

Great Longstone Parish Council recognises 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 association. 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 Great Longstone Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Great Longstone 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 Great Longstone records may be selected for permanent preservation as part of the Councils archives and for historical research.

### **Responsibilities**

Great Longstone 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. The person responsible for the records management will give guidance for good records management practice and will provide compliance with this policy so that information will be received easily, appropriately and timely. Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Great Longstone Parish Council's record management guidelines.

## RETENTION SCHEDULE GREAT LONGSTONE PARISH COUNCIL

The retention schedule refers to record series regardless of the media in which they are stored.

| <b>Document Category</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                                     | 6 years                          | Management      |
| Staff references                                              | 6 years after ceasing employment | Management      |
| Applications forms<br>(interview – unsuccessful)              | 6 months                         | Management      |
| Application forms                                             | 6 years after ceasing employment | Management      |
| Disciplinary files                                            | 6 years after ceasing employment | Management      |
| <b>FINANCE</b>                                                |                                  |                 |
| Scale of fees and charges                                     | 6 years                          | Management      |
| Receipts and payment a/c's                                    | 6 years                          | VAT             |
| Bank statements                                               | 6 years                          | Audit           |
| Cheque book stubs                                             | 6 years                          | Audit           |
| Paid invoices                                                 | 6 years                          | VAT             |
| Payroll records                                               | 6 years                          | HMRC            |
| Petty cash accounts                                           | Last completed audit year        | Audit           |
| <b>INSURANCE</b>                                              |                                  |                 |
| Insurance policies                                            | Indefinite                       | Management      |
| Certificates for insurance<br>against liability for employees | Indefinite                       | Management      |
| Certificates for Public liability                             | Indefinite                       | Management      |
| <b>HEALTH AND SAFETY</b>                                      |                                  |                 |
| Accident books                                                | 3 years from date of last entry  | Statutory       |
| Risk assessment                                               | 3 years                          | Management      |
| <b>GENERAL MANAGEMENT</b>                                     |                                  |                 |
| Councillors contact details                                   | Duration of membership           | Management      |
| Contracts                                                     | 6 years                          | Limitation 1980 |
| Email messages                                                | Archive                          | Management      |
| Consent forms                                                 | 5 years                          | Management      |

Date of Last Review – 8<sup>th</sup> July 2026