

# **WILSFORD PARISH COUNCIL RECORDS RETENTION POLICY**

**WILSFORD PARISH COUNCIL** recognised 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 council. 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 **WILSFORD PARISH COUNCIL** in the course of carrying out its functions. Records are defined by all those documents which facilitate the business carried out by **WILSFORD 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 **WILSFORD PARISH COUNCIL** records may be selected for permanent preservation as part of the Councils archives and for historical research.

## **RESPONSIBILITIES**

**WILSFORD 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 Parish Clerk. 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 staff and employees must ensure that records for which they are responsible are accurate and are maintained and disposed of in accordance with **WILSFORD PARISH COUNCIL'S** records management guidelines.

## **RETENTION SCHEDULE**

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

<b>Document</b>	<b>Minimum Retention Period</b>	<b>Reason</b>
<b>MINUTES:</b>		
Council 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	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:</b>		
Scales of fees and charges	6 years	Management
Receipt and Payment accounts	6 years	VAT
Bank Statements	Last completed audit year	Audit
Cheque Book stubs	Last completed audit year	Audit
Paid Invoices	Last completed audit year	VAT
Payroll records	3 years	HMRC
<b>INSURANCE:</b>		
Insurance Policies	6 years after policy end	Management
Certificate for Insurance against liability for employees	6 years after policy end	Management
Certificate 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
<b>GENERAL MANAGEMENT:</b>		
Councillors contract 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

**Adopted Wilsford Parish Council 19 April 2018**  
**Reviewed and accepted 11 June 2019**