

# RADWAY PARISH COUNCIL

## Documentation & Retention Policy

Date of Adoption	Review date
15 May 2025	
May 2026	May 2027

## **1. Introduction**

1.1. The 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.

## **2. Scope**

2.1. 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.

## **3. Responsibilities**

3.1. 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 will be retrieved easily, appropriately and in a timely manner. Any records that are held on the Parish Council's computer will be backed up regularly to a hard drive by the Clerk.

## **4. Retention Format**

4.1. Documents will be retained by the Parish Council in the most appropriate format. These formats will include paper, electronic and scanned documents. Where documents are retained in electronic format the original documents will not necessarily be retained unless the Parish Council is required to do so in law.

4.2. Where possible documents will be lodged with the Warwick Records for safe keeping and a receipt obtained. When this option is used the Parish Council retains ownership of the deposited documents.

## **5. Retention Schedule**

5.1. Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the record series which it creates in the course of 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.

5.2. 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 record series regardless of the media in which they are stored.

## **6. Retention of Documents**

<b>Document</b>	<b>Minimum Retention</b>	<b>Reason</b>
Minute Books	Indefinite	Archive

Annual Accounts	Indefinite	Archive
Annual Return	Indefinite	Archive
Receipt & Payment Account	Indefinite	Archive
Bank Statements	7 years	Audit
Cheque book stubs	Last completed audit	Management
Paying in books	Last completed audit	Management
Quotations	7 years	Audit
Paid invoices	7 years	Audit
VAT records	7 years	Audit
Salary records	7 years	Audit
Tax and NI records	7 years	Audit
Insurance policies	7 years	Audit
Cert of Employers Liability	40 years	Audit/legal
Cert of public liability	40 years	Audit/legal
Assets register	Indefinite	Audit
Title Deeds, Leases, Agreements & Contracts	Indefinite	Audit/Management
Minute Book	Indefinite	Archive
Declarations of acceptance	Term of office + 1 year	Management
Members register of interests book	Term of office + 1 year	Management
Complaints	1 year	Management
Routine correspondence & emails	24 months	Management

## 7. Planning Applications

7.1. All planning applications and relevant decision notices are available at Stratford District Council. There is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the Council minutes and are retained indefinitely. Correspondence received in connection with applications will be retained as stated below.

## 8. Disposal Procedure

8.1.1. All documents that are no longer required for administrative reasons should be shredded and disposed of. The Council should not retain documents longer than is necessary. Timely disposal should be undertaken to ensure compliance with the General Data Protection Regulations so that personal information is not retained longer than necessary. This will also ensure the most efficient use of limited storage.