

# WESTON ON THE GREEN PARISH COUNCIL

## Document Retention Policy



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. This document provides the policy framework through which this effective management can be achieved and audited.

### 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 percentage 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 Parish Council Clerk has overall responsibility for the implementation of this policy. The Clerk is 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.

### Retention Schedule

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.

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.

### Retention of Documents

Document	Minimum	Retention Reason
Minute Books	Indefinite	Archive
Annual Accounts	Indefinite	Archive
Annual Return	Indefinite	Archive
Bank Statements	7 years	Audit/Management
Cheque Book Stubs	Last completed audit	Management
Quotations	7 years	Audit
Paid Invoices	7 years	Audit/VAT
VAT Records	7 years	Audit/VAT
Salary Records	7 years	Audit
Tax & NI Records	7 years	Audit
Insurance Policies	2 years	Audit

Certificate of Employers Liability	40 years	Audit/Legal
Certificate of Public Liability	40 years	Audit/Legal
Assets Register	Indefinite	Audit
Deeds, Leases	Indefinite	Audit
Electoral Register	1 year (once new one issued destroy previous)	Management
Declaration of Acceptance of Office	Term of Office + 1 year	Management
Members Register of Interests'	Term of Office + 1 year	Management
Complaints	1 year	Management
General Information, Routine Correspondence	6 months	Management
Planning Applications	6 months	Management
Website Backup	6 months	Management

### **Planning Applications**

All planning applications and relevant decision notices are available at Cherwell District Council (CDC). There is no requirement to retain duplicates locally. Parish Council recommendations in connection with these applications are recorded in the Council Minutes and are held on the CDC Planning Portal. Correspondence received in connection with applications will be retained as stated above.

### **Disposal Procedures**

All documents that are no longer required for administrative reasons should be shredded (if confidential) and disposed of.

**Policy Adopted by Weston on the Green Parish Council:** 7<sup>th</sup> June 2023 (Minute Reference: 23.397.19)

**Review Date:** October 2025 (subject to legislation changes)