

WEST BRETTON PARISH COUNCIL

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 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 person with the overall responsibility for the implementation of this policy is the Clerk to the Parish Council, and the Clerk is 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.

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

<u>Document</u>	<u>Minimum Period</u>	<u>Reason</u>
MINUTES		
Approved minutes	Indefinite	Archive
Draft/rough/notes of minutes taken at meetings	Until minutes are approved	Management
FINANCE		
Receipt and Payment Accounts	Indefinite	Archive
Paid invoices	6 years	VAT
VAT records	6 years	VAT
Bank Statements	Last completed audit year	Audit
Paying in books	Last completed audit year	Audit
Cheque stubs	Last completed audit year	Audit
Scales of fees and charges	5 years	Management
Members allowances register	6 years	Tax, Statute of Limitations
Annual Audit return	Indefinite	Audit
INSURANCE		
Insurance policies	2 years	Management
Certificates of Employers' Liability Insurance	40 years	Limitation period
OTHER		
Quotations and tenders	12 years /indefinite	Statute of Limitations
Title deeds, leases, agreements, contracts	Indefinite	Audit, Management
Notes from meetings	Until minutes are confirmed	Minutes are signed
Grant applications	7 years	Archive
Planning Applications		
All planning applications and relevant decision notices are available at Wakefield Metropolitan 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.		
Other		
Declarations of acceptance	Term of Office + 1 year	
Members register of interests' book	Term of Office + 1 year	
Complaints	1 year	
Routine correspondence and e-mails	6 months	
General Information	3 months	
Grant Applications	7 years	

Disposal procedures

All documents that are no longer required for administrative reasons will be shredded and disposed of.

Records/data no longer required by West Bretton Parish Council for administrative purposes will be finely shredded and deleted entirely and securely from the West Bretton Parish Council computer system(s).