

## **Ingoldsby Parish Council Records Retention Policy**

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

### **Responsibilities**

Ingoldsby 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 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 in a timely manner. The Clerk must ensure that records are accurate and are maintained and disposed of in accordance with the Council's records management guidelines.

### **Retention Schedule**

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

Document	Minimum Retention Period	Reason
<b>Minutes</b>		
Minutes of Council or Committee meetings	Indefinite	Archive
Audio recordings of meetings	Delete after minutes of the meeting have been approved	Management
<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	Indefinite	Archive
Bank statements	6 years	Audit
Cheque book stubs	Last completed audit year	Audit
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980
Payroll records	3 years	HMRC
<b>Insurance</b>		
Insurance policies	6 years after policy end	Management
Certificates for Insurance against liability for employees	6 years after policy end	Management
Certificates 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 contact details	Duration of membership	Management
Email messages	2 years	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management

Version number	Purpose/change	Adopted	Review Date
V1.0	New Policy	2 July 2025	May 2026