

Management of Records Policy

| RECORD | ACTION | MINIMUM RETENTION PERIOD | REASON |
|---|---------------|---------------------------------|-----------------------|
| Administration | | | |
| Signed Minutes of Council Meetings | P | Indefinite | Archives |
| Reports & other documents circulated with agendas not attached to signed Minutes | R | Indefinite | |
| Agendas (if Minutes do not survive) | P | Indefinite | |
| Councillors' Declarations of Office | P | Indefinite | Archives |
| Nomination forms for parish council elections (if minutes do not survive) | P | Indefinite | |
| Byelaws and Orders | P | Indefinite | Audit, Management |
| Title Deeds | P | Indefinite | Audit, Management |
| Registration of Village Greens, plans, etc | P | Indefinite | Audit, Management |
| Property registers & terriers, including register and plans for allotments | P | Indefinite | Audit, Management |
| Maps, plans & surveys of property owned by the Council/Meeting | P | Indefinite | Archives |
| Correspondence and papers on important local issues or activities | P | Indefinite | Archives |
| Planning applications and related papers for major controversial developments, also planning appeal decisions | P | Indefinite | |
| Leases, Agreements, Contracts & Wayleaves | P | Indefinite | Audit, Management |
| Quotations & tenders for major works | R | 12 years/Indefinite | Statute of Limitation |
| Quotations & tenders for minor works | D | 12 years | Statute of Limitation |
| Unsuccessful tenders | D | 3 years | Challenge |

KEY

P = Preserve permanently

R = Review

D = Destroy

APPENDIX 1

| RECORD | ACTION | MINIMUM RETENTION PERIOD | REASON |
|--|---------------|--|-------------------------------|
| Routine correspondence, papers & e-mails | D | Retain as long as useful | |
| Personnel records | | 3 months | Limitation period |
| Health & Safety records | | Indefinite | |
| Planning applications & related papers for minor works where permission is refused | D | Retain until appeal period has expired | |
| Scale of Fees and Charges | D | 5 years | Management |
| Insurance Policies | D | Retain while valid | |
| Finance | | | |
| Receipt and payment books | P | Indefinite | Archives |
| Investments | P | " | Audit, Management |
| Financial Returns to District Auditors (if general accounts do not survive) | D P | 6 years | Audit |
| Cash & Petty Cash books & Rent Books (if general accounts do not survive) | D R | 6 years | TAX, VAT Limitation period |
| Receipt Books of all kinds | D | 6 years | VAT |
| Postage & Telephone Books | D | 6 years | TAX, VAT Limitation period |
| Bank Statements, including deposit/saving a/cs | D | Last completed audit year | Audit |
| Bank Paying-in books and cheque book stubs | D | Last completed audit year | Audit |
| Paid Invoices | D | 6 years | VAT |
| Paid Cheques | D | 6 years | Limitation period |
| VAT records | D | 6 years | VAT |
| Time Sheets | D | Last completed audit year | Audit |
| Wage Books | D | 12 years | Limitation period |
| Members Allowances Register | D | 6 years | TAX Limitation |

| RECORD | ACTION | MINIMUM RETENTION PERIOD | REASON |
|---|---------------|---|---|
| Records relating to parish halls, centres and recreation grounds; applications to hire, lettings diaries, copies of bills to hirers and records of ticket issue | D | 6 years | VAT |
| Precept books and contribution orders | D | Retain as long as of value | |
| Miscellaneous | | | |
| Maps created under provision of the Rights of Way Act 1992 | P | Indefinite | Archives |
| Community Magazines/News Letters | D | 5 years | |
| Press cuttings books | P | Indefinite | |
| Photographs | P | Indefinite | |
| Any records dating from before 1894 now held by the council | P | Indefinite | Historical |
| Records of other bodies such as burial boards, charities, fire brigades, home guard units, local societies and <i>ad hoc</i> committees | P | See admin and finance | |
| ALL burial ground records (registers, plans, applications for interment & memorials and copy certificate of grant of exclusive right of burial | P | Indefinite | Archives Cemeteries Orders & Regulations |
| Reports, Guides, handbooks etc received by the council from other bodies | R/D | Retain as long as useful | |
| Planning applications & related papers for minor works where permission is granted | D | Retain until development has been completed | |

Presented to Finance Committee 20 January 2005 for approval and adoption