



# Savernake Parish Council

## **Records Retention Policy**

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

### **Responsibilities**

Savernake Parish Council has a 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 Chair of the Parish Council. 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 timely. Individual Councillors and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Savernake Parish 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	Responsibility	Reason
<b>Minutes</b>			
Minutes of Council meetings	Indefinite	Chair/Clerk	Archive
Minutes of committee meetings	Indefinite	Chair/Clerk	Archive
<b>Employment</b>			
Staff employment contracts	6 years after ceasing employment	Finance	Management
Staff payroll information	3 years	Finance	Management
Staff references	6 years after ceasing employment	Finance	Management
Disciplinary files	6 years after ceasing employment	Finance	Management
Staff appraisals	6 years after ceasing employment	Finance	Management
<b>Finance</b>			
Receipt and payment accounts	6 years	Finance	VAT
Bank statements	Last completed audit year	Finance	Audit
Cheque book stubs	Last completed audit year	Finance	Audit
Paid invoices	Last completed audit year	Finance	VAT
Paid cheques	Last completed audit year	Finance	Limitation Act 1980
Payroll records	3 years	Finance	HMRC
Petty cash accounts	Last completed audit year	Finance	Audit
<b>Insurance</b>			
Insurance policies	6 years after policy end	Finance	Management
Certificates for Insurance against liability for employees	6 years after policy end	Finance	Management
Certificates for Public Liability	6 years after policy end	Finance	Management
Insurance claim records	6 years after policy end	Finance	Management
<b>Health and Safety</b>			
Accident books	3 years from date of last entry	Infrastructure	Statutory
Risk assessment	3 years	Infrastructure	Management
<b>General Management</b>			
Councillors contact details	Duration of membership	Chair/Clerk	Management
Contracts	6 years	Chair/Clerk	Limitation Act 1980
Email messages	4 years	All	Management
GDPR Security Compliance form	Duration of membership	Chair/Clerk	Management