

Retention of Documents and Records Policy – September 2023

BUCKLESHAM PARISH COUNCIL

Ruth Johnson
CLERK, BUCKLESHAM PARISH COUNCIL

This policy details the minimum retention time required for Council documents before disposal in order for the Council to comply with the Freedom of Information Act 2000 Publication Scheme. Where variable times are indicated the Council will review storage after the minimum period has elapsed.

| Document | Minimum Period | Reason |
|--|----------------------------|-----------------------------|
| 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 |
| PLANNING | | |
| Permissions | 6 years | Compliance |
| Permissions - on appeal | Indefinite | Precedent |
| Permissions - commercial or development | Indefinite | Future compliance |
| Refusals | 2 years | Appeals |
| INSURANCE | | |
| Insurance policies | 21 years | Management |
| Certificates of Employers' Liability Insurance | 40 years | Limitation period |

| <i>Document</i> | <i>Minimum Period</i> | <i>Reason</i> |
|--|-----------------------------|------------------------|
| OTHER | | |
| Quotations and tenders | 12 years /Indefinite | Statute of Limitations |
| Title deeds, leases, agreements, contracts | Indefinite | Audit, Management |
| Routine correspondence, papers & emails | Retain as long as useful | |
| Notes from meetings | Until minutes are confirmed | Minutes are signed |

Adopted by the Parish Council at a meeting on: *6th September 2023*

Signed:

Ruth Johnson

David Brinkley

Ruth Johnson
Clerk

David Brinkley
Chair

Version Control

| Date | Details | Next Review |
|---------------------------------------|--------------------------------|----------------|
| 10th September 2020 | First Publication | September 2021 |
| 1st September 2021 | Review & Amend Clerk's details | September 2023 |
| 6th September 2023 | Review | September 2027 |
| | | |
| | | |