

DERSINGHAM PARISH COUNCIL

RECORDS MANAGEMENT AND RETENTION POLICY

Dersingham 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 overall effective management of the Parish Council. This document describes the Parish Council's policy for record management and retention and will be reviewed every three years. It provides the policy framework through which this effective management can be achieved and audited. It covers:

Scope

Responsibilities

Relationship with existing policies

Retention schedule

Scope of the Policy

This policy applies to all records and documentation 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.

The policy also applies to emails and email attachments categorised according to subject and content and is subject to the retention requirements shown in the retention schedule.

Some of the Parish Council's records will be permanently retained as part of the Council's archives and for historical research.

For any information retained under this Policy that is in an encrypted format, consideration must be taken for the secure storage of any encryption keys. Encryption keys must be retained for as long as the data that the keys decrypt is retained.

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 this policy is the Business Manager of the Parish Council.

The person responsible for record management will give guidance for good record management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and timely.

All employees and councillors must ensure that records for which they are responsible are accurate and are maintained and disposed of in accordance with the Parish Council's record management guidelines.

Relationship with existing policies

This policy has been drawn up within the context of

- Freedom of Information Policy
- Data Protection Policy
- And with other legislation or regulations, including audit and statute of limitations affecting the Parish Council.

Retention Schedule

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, as a minimum, for which the record needs to be retained and the action which should be taken when it is of no further administrative use.

All employees and councillors are expected to manage their current record keeping systems using the retention schedule and are to take account of the different retention periods when they are creating new record keeping systems.

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

Document	Minimum retention period	Reason
Administrative		
Signed minutes of council and committee meetings	Indefinite	Archive
Draft minutes	Retain until draft minutes are approved and signed	Management
Agendas	Indefinite	Archive
Reports and other documents circulated with agendas	Indefinite	Archive
Policy Documents	Until no longer a valid policy	Management
Councillors declaration of office	Until they vacate office	Management
Register of members interest	Until they cease to be a member	Management
Register of electors	Retain until issued with updated register	Management
Deeds and Leases of properties	Indefinite	Archive
Surveys of council owned property	Indefinite	Archive
General correspondence and emails	Retain as long as useful, minimum 6 months	Management
Correspondence and emails on important issues and activities	Retain together with associated documents indefinite	Archive
Finance		
Receipt and payment/income and expenditure accounts	Indefinite	Archive
Annual audited accounts	Indefinite	Archive
All bank statements	Last completed audit year plus 6 year	Audit
Bank paying in records	Last completed audit year plus 6 year	Audit
Cheque book stubs	Last completed audit year plus 6 year	Audit
Correspondence relating to audit matters	Last completed audit year plus 6 years	Audit
Budgetary control papers	Last completed Audit year plus 6 years	Audit
Quotations and tenders	6 years	Relevant Limitation Act
Paid invoices	6 years	Relevant VAT Act
VAT records	6 years	Relevant VAT Act
Investments	Indefinite	Management
Members allowance	6 years	Tax
Insurance		
Cert of Employers liability	40 years	Legal requirement
Cert of Public liability	21 years	Legal requirement
Insurance policies	40 years	Management

Renewal records and correspondence	40 years	Management
Insurance claim records	While ongoing or while a claim can be made	Management
Construction Projects		
All records relating to large construction projects including Dersingham Village Centre	Indefinite	Archive
Staff records		
Contracts of employment	6 years after ceasing	Management
Wages records	12 years	Superannuation
Time sheets	Last completed audit year	Audit
Personal files	6 years after ceasing	Management
Disciplinary records	Retain for period of employment	Management
Application forms, unsuccessful	6 months	Management
Health and Safety		
Accident books	25 years from closure	Management
Equipment and premises inspection records	25 years	Management
Risk Assessment	3 years from last assessment	Management
Miscellaneous		
Complaints	5 years after closure of case	Management
Information requests	5 years after closure of case	Management
Press releases	5 years	Management
Public consultation survey and returns	5 years	Management
Village Voice	Deposit copy with British Library. Indefinite	Archive
Mailing lists	Retain until consent withdrawn or no longer required	Management

This policy was adopted by Dersingham Parish Council on 24th November 2025

The policy will be reviewed every three years.