



BERRYNARBOR PARISH COUNCIL

Document Retention Policy

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Introduction

The 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 Parish Council. This policy provides the framework through which this effective management and retention of public records is achieved.

Scope

This policy applies to all records created, received or maintained by the Parish Council. Records are defined as all those documents which relate to the business carried out by the Parish Council and which thereafter retained (for a set period) to provide evidence of its communications, transactions and activities. These records may be created, received or maintained in hard copy or electronically. Some of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Retention Schedule

Document	Minimum Retention Period	Reason	Location Retained	Disposal
Signed Minutes	Indefinite	Archive	Locked Cabinet in Parish Council Offices	N/A
Agendas	5 Years	Management	Cabinet in Parish Council Offices	Shred/confidential waste
Accident/incident reports	20 years	Potential Claims	Locked Cabinet in Parish Council Offices	Shred/confidential waste. A list will be kept of those documents disposed of to meet the requirements of GDPR.
Scale of fees and charges	6 years	Management	Paper copy and on PC	Shred/confidential waste
Receipt and payment accounts including audited accounts	Indefinite	Archive	Locked cabinet in Parish Council Offices & Scribe software	N/A
Receipt books of all kinds	6 years	VAT	Locked cabinet in Parish Council	Shred/confidential waste
Bank Statements including deposit/savings accounts	Last completed audit year	Audit	Locked cabinet in Parish Council Offices	Shred/confidential waste
Bank paying-in books	Last completed audit year	Audit	Locked cabinet in Parish Council Offices	Shred/confidential waste
Cheque book stubs	Last completed audit year	Audit	Locked cabinet in Parish Council Offices	Shred/confidential waste

Quotations and Tenders	6 years	Limitation Act 1980 (as amended)	Paper copy	Shred/confidential waste. A list will be kept of those documents disposed of to meet the requirements of GDPR.
Paid invoices	6 years	VAT	Locked cabinet in Parish Council Offices	Shred/confidential waste
Paid cheques	6 years	Limitation Act 1980 (as amended)	Locked cabinet in Parish Council Offices	Shred/confidential waste
VAT records	6 years generally but 20 years for VAT on rents	VAT	Locked cabinet in Parish Council Offices	Shred/confidential waste
Petty cash, postage and telephone books	6 years	Tax, VAT, Limitation Act 1980 (as amended)	Locked cabinet in Parish Council Offices	Shred/confidential waste
Timesheets	Last completed audit year 3 years	Audit (requirement), Personal injury (best practice)	Locked cabinet in Parish Council Offices	Shred/confidential waste
Wages books/payroll	12 years	Superannuation	Locked cabinet in Parish Council Offices	Shred/confidential waste
Insurance policies	While valid (subject to the next four items)	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Insurance company names and policy numbers	Indefinite	Management	Locked cabinet in Parish Council Offices	N/A
Certificates for insurance against liability for employees	40 years from date on which insurance commenced or was renewed	The Employers' Liability (Compulsory Insurance) Regulations 1998 (SI 2753), Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Certificate for public liability	40 years from date on which insurance commenced or was	Audit/Legal	Locked cabinet in Parish Council Offices	Shred/confidential waste
Insurance claim records	7 years after conclusion	Legal	Locked cabinet in Parish Council Offices	Shred/confidential waste
Play area inspection sheets	21 years	Personal injury claims, Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Risk Assessments	3 years from last assessment	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Asset Register	Indefinite	Audit, Management	Locked cabinet in Parish Council Offices	N/A
Deeds; Leases	Indefinite	Audit, Management	Locked cabinet in Parish	N/A

			Council Offices	
Register of Members' Interests	18 months after individual ceases to be a member	Management	Paper copy in Parish Council Offices	Shred/confidential waste
Declarations of Acceptance of Office	Term of office + 1 Year	Management	Paper copy in Parish Council Offices	Shred/confidential waste
Job application forms (unsuccessful)	6 months	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Job application forms (successful)	Period of employment + 6 months	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Co-option application forms (unsuccessful)	6 months	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Co-option application forms (successful)	6 months after individual ceases to be a member	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Disciplinary records	Period of employment + 6 months	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Personal files (appraisals/pay reviews etc.)	Period of employment + 6 months	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Complaints	2 years after closure	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Information requests	2 years after closure	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Press releases	5 years	Management	On PC	Delete
Public consultations	5 years, longer if still relevant	Management	Locked cabinet in Parish Council Offices	Shred/confidential waste
Reports, Newsletters	As long as useful	Management	Paper copy in Parish Council Offices and on PC	Shred/Delete
Hire agreements	Period of agreement + 7 years	Management	Paper copy in Parish Council Offices and on PC	Shred/confidential waste, Delete

General correspondence will be retained for as long as is relevant.

All Planning Applications and relevant decision notices are available from the North Devon Council. There is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the Council's minute and are retained indefinitely. Correspondence relating to planning applications will be destroyed once it has been presented to Council.

An annual review of all documentation should be carried out and items that have

reached their deletion or destruction date will be deleted/destroyed and the remainder being considered for archiving.

Councillors should ensure that all confidential items are returned to the Parish Council Offices for confidential shredding. On resigning from Council Councillors should ensure they securely delete/destroy or return for confidential shredding all files and documents relating to the Parish Council. Councillors should be aware that records they hold may be subject to the provisions of the General Data Protection Regulations and the Freedom of Information Act 2000.

This Policy will be reviewed every three years to ensure it is relevant to working practices.

Date of Annual Review	Change Description	Minutes Number
10 March 2026	Reviewed. Contact details amended and new format adopted	2603/16