

BOLNEY PARISH COUNCIL
RETENTION OF DOCUMENTS POLICY
Adopted 18th November 2025

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 document provides the policy framework through which this effective management can be achieved and audited.

Scope of the Policy

This policy applies to all records 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.

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 overall responsibility for the implementation of this policy is the Clerk to the Parish Council, who is required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

Retention Schedule

Under the Freedom of Information Act 2000, 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 which the record needs to be retained and the action which should be taken when it is of no further administrative use. The Clerk is expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when creating new record keeping systems.

Disposal procedures

Documents that are no longer required for administrative reasons will be shredded or burned, or deleted if electronic copy, and disposed of.

Retention of Documents Schedule

DOCUMENT	MINIMUM RETENTION PERIOD	REASON
Minute books	Indefinite	Archive
Receipt and payment accounts(s)	Indefinite	Archive
Annual accounts, Annual return and asset registers	Indefinite	Archive
Bank statements, including deposit/savings accounts	Last completed audit year	Audit
Bank paying-in books	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Quotations and tenders	6 years	Limitation Act 1980 (as amended)
Paid invoices	6 years	VAT
VAT records	6 years	VAT
Personnel records	6 years	Audit
Pension contribution records	6 years	Pensions Act 2014
Insurance policies	As long as a claim can be made under it	Management and legal proceedings
Certificates for Insurance against liability for employees	Indefinitely	Future claims
Register of Electors	Until new register is in force	Management
Declaration of acceptance of office	Term of Office + 1 year	Management
Members register of interests	Term of Office + 1 year	Management
Complaints	1 year	Management
Grant Applications	Until end of administrative use	Management
Correspondence & emails	Until end of administrative use	Management