

Cromhall Parish Council

Records Retention Policy

Version	Date adopted	Minute ref.	Details / Key Changes	Review due
1.0	24/01/2023	2023/01b/8.2	First adoption. Based on SLCC model.	
1.1	23/01/2025	2025/01/10.2	Re-adopted – no amendments	
1.2	20/01/2026	2026/01/10.4	Added acceptance of office, register of interests. Removed redundant lines where council does not hold that data. Added review period.	January 2030

Cromhall 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.

Scope

This policy applies to all records created, received or maintained by Cromhall Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Cromhall 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. Some records are required by legislation to be preserved indefinitely. Other records may be selected for permanent preservation as part of the Council's archives and for historical research purposes.

Responsibilities

Cromhall 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 Clerk, who 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. Staff and councillors must ensure that any records for which they are responsible are maintained and disposed of in accordance with this policy.

Retention Schedule

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

Document	Minimum Retention Period	Reason
Minutes		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
Employment		
Staff employment contracts	6 years after ceasing employment	Management
Staff payroll information	3 years	Management
Staff references	6 years after ceasing employment	Management
Application forms (interviewed – unsuccessful)	6 months	Management
Application forms (interviewed – successful)	6 years after ceasing employment	Management
Disciplinary files	6 years after ceasing employment	Management
Staff appraisals	6 years after ceasing employment	Management
Finance		
Scales of fees and charges	6 years	Management

Document	Minimum Retention Period	Reason
Receipt and payment accounts	Indefinite	Archive
Bank statements	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Invoices	6 years + current year	VAT/audit
Payroll records	6 years + current year	HMRC/audit
Community grant applications	3 years	Management/audit
Insurance		
Insurance policies	6 years after policy end	Management
Certificates for Insurance against liability for employees	6 years after policy end	Management
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
Health and Safety		
Accident books	3 years from date of last entry	Statutory
Risk assessments	3 years	Management
General Management		
Councillors contact details	Duration of membership	Management
Acceptance of Office forms	Term of office	LGA 1972 s83(4)
Register of Interest	Term of office + 1 year	Localism Act 2011
Lease agreements	12 years	Limitation Act 1980
Contracts	6 years	Limitation Act 1980
Email messages	At end of useful life	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management

Review

This policy will be reviewed at least every four years.