

## Wheatley Hill Parish Council

### Appendix A: List of Documents for Retention or Disposal

DOCUMENT	MINIMUM RETENTION PERIOD	REASON
<b>General Admin</b>		
Minutes	Indefinite	Legal Requirement
Agendas	5 Years	Management
Reports	5 Years	Management
Notes from Meetings	Destroyed after typed up	Not a legal record and could be requested under FOI.
General Correspondence	1 Year unless considered of a historical nature or judged to be relevant to Parish Council business	Management
Emails	Clerk to assess and if not needed emails are deleted each week	Reference
Correspondence relating to staff	Should be kept securely and personal data in relation to staff should not be kept for longer than is necessary for the purpose it was held. Likely time limits for tribunal claims between 3–6 months Recommend this period be for 3 years	After an employment relationship has ended, a council may need to retain and access staff records for former staff for the purpose of giving references, payment of tax, national insurance contributions and pensions, and in respect of any related legal claims made against the council.
Postage Book	6 Years	Audit/management
<b>Finance</b>		
Invoices	6 Years	VAT inspections/audit
VAT Records	6 Years Minimum	VAT inspection
Employee Financial Info	2 years after employee leaves	HMRC
Receipts/Payments	Indefinite	Reference
Cheque stubs/Paying in books/Bank Statements	Last Completed audit year	Audit
Quotations and Tenders	6 Years	Reference
Payroll	Minimum 3 years	HMRC
Precept	6 Years	Reference
Fees and charges	6 Years	Management

<b>Health and Safety</b>		
Insurance policies	Whilst valid	Management
Insurance Certificates against liability for employees	40 Years	The Employers Liability (compulsory insurance) Regulations 1998 (SI2753) management
Title deeds, leases, agreements, contracts	Indefinite whilst owned by Parish Council	Audit/Management
<b>Cemetery</b>		
<ul style="list-style-type: none"> <li>• Register of fees collected</li> <li>• Register of burials</li> <li>• Register of purchased graves</li> <li>• Register/plan of grave spaces</li> <li>• Register of memorials</li> <li>• Applications for interment</li> <li>• Applications for right to erect a memorial</li> <li>• Disposal certificates</li> <li>• Copy of certificates of grant of Exclusive right of Burials</li> </ul>	Indefinite	Historical, Reference. Archives, Local Authorities Cemeteries Order 1977 (S1204)
<b>Allotments</b>		
Register and Plans	Indefinite	Audit/Management
Minutes	Indefinite	Audit/Management
Legal Papers	Indefinite	Audit/Management
<b>Other</b>		
Members Register of Interests	Only current information required. Destroyed after Member ceases to be a Member or after every election	Legal Requirement

<b>Members Allowances</b>	<b>6 Years</b>	<b>Tax, Limitation Act 1980 (as amended)</b>
<b>Electoral Register</b>	<b>Ongoing updates via DCC</b>	<b>Reference</b>
<b>Photographs</b>	<b>Retained as long as necessary. Destroyed/deleted when no longer required</b>	<b>Reference, promotional items, Parish Newsletters, social media</b>
<b>Planning Applications</b>	<b>Not retained – items for minutes only, full details available from external source. For minute purposes only. DCC planning.</b>	
<b>Information from outside bodies</b>	<b>Retained as long as useful</b>	<b>Reference</b>
<b>Council newsletters</b>	<b>Council may wish to keep its own publications. For others retain for as long as they are useful</b>	<b>Reference</b>
<b>Employee records</b>	<b>Duration of employment plus five years</b>	<b>Should a claim arise</b>
<b>Accident/Incident reports</b>	<b>20 Years</b>	<b>Potential claim</b>