

# Middleton cum Fordley Parish Council

## Document Retention Policy

**Adopted: 13 March 2018**

### 1. Introduction

This policy is in two parts.

The first part provides guidance for the retention of Council documents and electronic information and is based on guidance provided by the Local Council Policy Advisory Service and the National Association of Local Councils.

The second part deals with use of the Parish Council web-site as a medium for making council information available to residents and the general public.

### 2. Retention of documents and electronic information

The following table details the minimum retention time required for council documents before disposal in order for the council to comply with the Freedom of Information Act 2000 Publication Scheme and other relevant legislation. Where variable times are indicated the Council will review storage after the minimum period has elapsed.

Document	Minimum Period	Reason
<b>AGENDAS AND MINUTES</b>		
Agendas and supporting papers	Indefinite	Archive
Approved minutes	Indefinite	Archive
Draft/rough/notes of minutes taken at meetings	Until minutes are approved	Management
<b>FINANCE</b>		
Annual financial statements and annual returns	Indefinite	Archive
Paid invoices	6 years	VAT
VAT records	6 years	VAT
Bank Statements	6 years	Audit
Paying in books	Last completed audit year	Audit
Cheque stubs	Last completed audit year	Audit

Gift aid declarations	6 years from latest donation	Tax
<b>INSURANCE</b>		
Insurance policies	2 years	Management
Certificates of Employers' Liability Insurance	40 years	Limitation period
<b>OTHER</b>		
Quotations and tenders	12 years /indefinite	Statute of Limitations
Title deeds, leases, agreements, contracts	Indefinite	Audit, Management
Routine correspondence held by Clerk(paper)	6 years	Management
Routine correspondence held by clerk (e-mails)	6 years	Management
Applications to hire Council facilities	6 years	VAT

### 3. Use of Parish Council web-site

The following documents should be available on the web-site on or soon after the dates indicated and kept available for the time shown. This policy is to apply from the date it is adopted by the Council and does not imply that documents from previous periods will be uploaded.

	When added to web-site	When removed
Agendas for Parish Council and Annual Parish meetings	When sent to Councillors	After one year
Minutes of Parish Council meetings	When approved by the Parish Council	After 20 years
Parish annual reports	When issued	After 20 years
Annual Parish financial statements	When approved by the Parish Council	After 20 years
Council policy documents	When approved by the Parish Council	Indefinitely or until revised or withdrawn