LYDIARD MILLICENT PARISH COUNCIL
DOCUMENT RETENTION POLICY

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.

Scope
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 regulatory requirements. The Clerk has overall responsibility for the implementation of this policy and they are required to manage the Council's records in such a way as to promote compliance with this policy so that information can be retrieved easily, appropriately and in a timely manner.

Retention Schedule
Under the Freedom of Information Act 2000, the Council is required to maintain a retention schedule listing the records which it creates in the course of its business. The retention schedule sets out 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. This retention schedule refers to records regardless of the media in which they are stored.

Retention of Documents and Data

Document	Minimum Retention	Reason	Action
Minute books	Indefinite		Archive
Agendas	Indefinite		Archive
Annual audited accounts	Indefinite		Archive
Annual return	Indefinite		Archive
Bank statements	Financial year + 6 years	Audit	Destroy
Cheque book stubs	Financial year + 6 years	Management	Destroy
Paying in books	Financial year + 6 years	Management	Destroy
Successful quotations / tenders	6 years post end of contract	Audit	Destroy
Signed contracts	6 years post end of contract	Audit	Destroy
Paid invoices	Financial year + 6 years	Audit / VAT	Destroy
VAT records	Financial year + 6 years	VAT	Destroy
Salary records	Financial year + 6 years	Audit	Destroy
Tax & NI records	Financial year + 6 years	Audit	Destroy

Pension records	Financial year + 6 years	Audit	Destroy
Employee records	6 years post employment	Management	Destroy
Insurance policies	While valid	Audit	Destroy
Certificate of employer's liability	40 years	Audit / legal	Destroy
Certificate of public liability	12 years	Audit / legal	Destroy
Accident reports	20 years	Legal	Destroy
Asset register	Indefinite		Preserve
Deeds / leases	Indefinite		Archive
Declaration of Acceptance of Office	End of member term	Management	Destroy
Risk assessments	Once superseded	Management	Destroy
Members interests	End of member term	Management	Destroy
General information / routine correspondence and emails	2 years	Management	Destroy
Volunteer information	While active	Management	Destroy
Play inspection reports inc. annual inspections	20 years	Legal	Destroy
Unsuccessful job applicants	6 months	Management	Destroy
Litigation correspondence	6 years post file closure	Legal	Destroy
Employee performance documents	6 years post employment	Legal	Destroy
Internal audit report	Indefinite		Archive
External audit report	Indefinite		Archive
Scale of fees and charges	5 years	Management	Destroy
Hirer booking forms and invoices	Financial year + 6 years	Audit	Destroy
Cemetery records	Indefinite		Archive
Neigbourhood Plan documents and correspondence	6 years	Management	Destroy

Document Disposal
When documents are scheduled for disposal, the method of disposal should be appropriate to the nature and sensitivity of the documents concerned. Documents will be disposed of by the following methods:

- Non-confidential records: place in waste paper bin
- Confidential records or records holding personal data: shred documents
- Electronic documents on computers: deleted, including recycle bin
- Emails sent and received: deleted, including trash folder

All employees with access to email and electronic files will review their saved files and emails accounts annually to ensure compliance with the retention periods within this policy.

Councillors will review their email accounts annually in line with the retention periods in this policy.

Daily system data back-ups are retained for 2 years in line with the contractual agreement made with the Council's cloud computing provider.

Adopted by Lydiard Millicent Parish Council on 5 March 2026 (Minute Ref. 25.201e)