**STONEY MIDDLETON DOCUMENT RETENTION POLICY**

Stoney Middleton Parish Council recognises 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.

It covers:

- Scope

- Responsibilities

- Retention schedule

**Scope**

This policy applies to all records created, received or maintained by Stoney Middleton 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. A small percentage of Stoney Middleton records may be selected for permanent preservation as part of the Councils archives and for historical research.

Clerical records which are required to be kept indefinitely should periodically be transferred to the Derbyshire Record Office.

**Responsibilities**

Stoney Middleton 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 this policy is the Clerk. The person responsible for the records management will give guidance for good records management practice and will provide compliance with this policy so that information will be received easily, appropriately and timely. Individual employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Stoney Middleton Parish Council’s record management guidelines.

All documents no longer required should be shredded where possible and disposed of responsibly.

**RETENTION SCHEDULE STONEY MIDDLETON PARISH COUNCIL**

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

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| **Document Category**  | **Minimum Retention Period**  | **Reason** |
| **MINUTES** |  |  |
| Minutes of Council meetings  | Indefinite  | Archive |
| Minutes of committee meetings | Indefinite  | Archive |
| **EMPLOYMENT** |  |  |
| Staff recruitment  | 1 year after recruitment finalised | Management |
| Staff payroll information | 6 years after ceasing employment | Management |
| **FINANCE** |  |  |
| Scale of fees and charges | 6 years | Management |
| Receipts and payment a/c’s | 6 years | VAT |
| Bank statements | 6 years | Audit |
| Cheque book stubs | 6 years | Audit |
| Paid invoices | 6 years | VAT |
| Payroll records | 6 years | HMRC |
| Petty cash accounts | Last completed audit year | Audit |
| **INSURANCE** |  |  |
| Insurance policies | 6 years after policy end | Management |
| Certificates for insurance | 6 years after policy end | Management |
| Certificates for Public liability | 6 years after policy end | Management |
| **GENERAL MANAGEMENT** |  |  |
| Correspondence – General | Records should be kept for as long as they are needed for reference or accountability purposes, to comply with regulatory requirements or to protect legal and other rights and interests. | Management |
| DALC circulars | 1 year or as long as useful | Management |

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| **Document Category**  | **Minimum Retention Period**  | **Reason** |
| Grant applications | 6 years | Legislation, Management |
| Playground equipment inspection reports | Indefinite | Legal |
| Quotations and tenders | 6 years | Limitation Act 1980 ( as amended) |
| **Deeds, Historical Documents** |  |  |
| Village Cross Title Deeds | Indefinite – lodged with Taylor & Emmett Solicitors Bakewell | Legal |
| Grove Gardens Title Deeds | Indefinite – lodged with Taylor & Emmett Solicitors Bakewell | Legal  |
| Playing Fields Title Deeds | Indefinite – lodged with Taylor & Emmett Solicitors Bakewell | Legal |
| Bath House & Gardens Title Deeds | Indefinite – lodged with Taylor & Emmett Solicitors Bakewell | Legal |
| **Planning Documentation**  |  |  |
| Planning applications | No requirement to keep the planning application once the Parish Council has commented and it has been minuted | Management |
| Councillors Declaration of Office | 4 years or until they vacate office | Legislation, Management |
| **Allotments** |  |  |
| Allotment Agreements | 6 months after the end of the Agreement | Management |
| Correspondence relating to allotment plots | 6 months or as long as is useful | Management |