

Document Retention Policy

Humshaugh Parish Council

1. Purpose

The purpose of this policy is to ensure that the Parish Council keeps records for as long as they are needed and no longer, in line with legal requirements and good practice.

2. Scope

This policy applies to all records created or held by the Parish Council, whether paper or electronic.

The Parish Clerk is responsible for adherence to this policy. Councillors are responsible for ensuring that any Council records in their possession are handled and retained in accordance with this policy.

3. General Principles

- Records will be kept only for as long as they are required for legal, administrative, financial, or historical purposes.
- Records containing personal data will be handled in accordance with data protection legislation.
- Records that are no longer required will be securely destroyed (e.g. shredding or permanent deletion).

4. Retention Schedule

The table below sets out the minimum periods for which records should be kept.

Record Type	Minimum Retention Period
Council minutes (signed)	Permanently
Agendas and supporting papers	6 years
Correspondence (general)	3 years
Correspondence relating to legal matters	6 years
Financial accounts and audit records	6 years
Receipts, invoices, and vouchers	6 years
Bank statements and reconciliations	6 years
Asset register	Life of asset + 6 years
Insurance policies and claims	6 years after expiry/ settlement
Contracts and agreements	6 years after termination
Planning applications (consultations)	3 years
Staff records (if applicable)	6 years after employment ends
Grant applications and supporting documents	6 years
Complaints	6 years

5. Storage and Archiving

Records of long-term historical value (such as signed minutes) will be securely archived and retained permanently.

Where practical, documents may be retained in digital form. Physical copies are not required for most routine documents where a clear and accessible digital version is available.

Documents will be organised and named in a logical manner to ensure that they can be readily identified and accessed by a competent person.

Records will be stored using appropriate and secure systems.

Critical documents of legal, financial or historical importance (such as signed minutes, legal agreements or deeds) will also be retained in hard copy and stored securely.

6. Destruction of Records

When records reach the end of their retention period they will be:

- Shredded if held in paper form, or
- Permanently deleted if held electronically.

A record of destruction may be kept where appropriate.

7. Review

This policy will be reviewed every three years or sooner if legislation or guidance changes.

Adopted by: Humshaugh Parish Council

Date:

Next review date: Three years after adoption date

Version: 1.0