



DOCUMENT RETENTION POLICY

Adopted by Brixton Parish Council - 29th January 2025

Reviewed by Brixton Parish Council – 25th June 2025

This policy will be reviewed on an annual basis

Date for next review – June 2026

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Brixton Parish Document Retention Policy

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Introduction

Brixton 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 of the policy

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.

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Responsibilities

The Parish Council has a 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 Clerk will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely fashion.

The Parish Council will only keep data for as long as it is necessary to do so.

Strategic Approach to Record Management

Brixton Parish Council's policy on record management will enable to council to:

- Comply with the relevant legislation and codes of practice
- Ensure all records created by the Parish Council are authentic, relevant, complete, accurate and useable.
- Keep accurate records in an organised and accessible form
- Keep records for as long as necessary
- Document actions and decisions in record
- Enable the efficient and accurate retrieval of information
- Dispose correctly of records no longer required
- Document reasons for disposal of records

Retention Schedule

Documents and records should be retained until they are no longer needed. Under the Freedom of Information Act 2000 and Data Protection Act 2018, the Parish Council is required to maintain a retention schedule created in the course of its business. The retention schedule lays down 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.

Record Disposal

Records designated for disposal must be securely disposed of to preserve confidentiality.

Appendix 1 – Retention Schedule

Document	Minimum Retention Period	Reason
Minutes & Correspondence		
Agendas	5 years	Management
Recordings and notes of meetings	1 month or immediately following approval of the minutes	Management
Signed minutes	Indefinite	Archive Public inspection
General emails and correspondence	Retained for as long as document is required	Management
Information from other bodies (DALC, DCC, SHDC)	Retained for as long as document is required / useful	Management
Local / historical information	Indefinite	To be kept securely
Finance		
Audited accounts	Indefinite	Audit
Receipt and payment accounts	Indefinite	Archive
Receipt books of all kinds	6 years	Audit
All bank statements	Last completed audit year	Audit
Bank paying-in books	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Quotations and tenders (successful)	6 years	Limitation Act 1980 (as amended)
Paid invoices	6 years	VAT / Audit
Paid cheques	6 years	Limitation Act 1980 (as amended)
VAT records	6 years	VAT
Wages / payroll	6 years from end of employment	Audit
Budgets / Precepts	Indefinite	Local Choice
Investments	Indefinite	Audit / Management
Human Resources		
Employee information	6 years from term of employment	Taxes Management Act 1970
Staff contracts	6 years from end of employment	Audit
Insurance		
Accident / incident reports	20 years	Potential claims
Insurance policies	While valid	Management
Insurance company names and policy numbers	Indefinite	Management
Insurance claims	7 years after all obligations are concluded or child reaches age of 25	Limitation Act 1980 (as amended)
Insurance certificates	40 years	The Employers Liability (Compulsory Insurance) Regulations 1998

Health and Safety inspection records	6 years	Management
Miscellaneous		
Strategic plans	Until superseded	Common Practice
Policies & Operational Procedures	Until superseded	Common practice
Declarations of office	Term of office	Management
Members register of interests	Term of office	Management
Complaints	2 years from resolution	Management
Title deeds, leases, agreements, contracts	Indefinite	Audit / Management
Legal / Litigation files	6 years	Common practice