

# Toft Newton Parish Council

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## Records Retention Policy

Toft Newton 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 council.

This document provides the policy framework through which this effective management can be achieved and audited. It covers our responsibilities and details our adopted retention schedule.

### Scope

This policy applies to all records created, received or maintained by Toft Newton Parish Council in the course of carrying out its functions.

Records are defined as all those documents which facilitate the business carried out by Toft Newton 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 Toft Newton Parish Council records may be selected for permanent preservation as part of the Lincolnshire County Council archives and for historical research.

### Responsibilities

Toft Newton 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 Parish Council Clerk, who is also the Responsible Financial Officer and the Proper Officer.

Toft Newton Parish Council will provide guidance for good records management and practice to all staff and Councillors, we will expect compliance with this policy so that information can be retrieved easily, appropriately and timely.

Individual staff and Councillors must ensure that records for which they are responsible are accurate and maintained and disposed of in accordance with Toft Newton Parish Council's Data Protection Policies, an good practice records management guidelines.

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Approved by Toft Newton Parish Council:

5<sup>th</sup> May 2026

Review due:

May 2027

## Retention Schedule

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

DOCUMENT	MINIMUM RETENTION PERIOD	REASON
<b>MINUTES</b>		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
<b>EMPLOYMENT</b>		
Staff employment contracts	6 years after ceasing employment	Management
Staff payroll information	3 years	Management
Staff references	6 years after ceasing employment	Management
Application forms (interviewed – unsuccessful)	6 months	Management
Application forms (interviewed – successful)	6 years after ceasing employment	Management
Disciplinary files	6 years after ceasing employment	Management
Staff appraisals	6 years after ceasing employment	Management
<b>FINANCE</b>		
Scales of fees and charges	6 years	Management
Receipt and payment accounts	6 years	VAT
Bank statements	3 years	Audit
Paid invoices	3 years	VAT
Payroll records	3 years	HMRC
Petty cash accounts	Last completed audit year	Audit
<b>INSURANCE</b>		
Insurance policies	6 years after policy end	Management
Certificates for Insurance against liability for employees	6 years after policy end	Management
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
<b>HEALTH AND SAFETY</b>		
Accident books	3 years from date of last entry	Statutory
Risk assessment	3 years	Management
<b>GENERAL MANAGEMENT</b>		
Councillors contact details	Duration of membership	Management
Lease agreements	12 years	Limitation Act 1980
Contracts	6 years	Limitation Act 1980
E-mail messages	At end of useful life	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management