

Ickleton PC: Document Retention Policy

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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. This document provides the policy framework through which this effective management can be achieved and audited. It covers:

Scope

Responsibilities

Retention Schedule

Disposal of records

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 corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. The person with overall responsibility for the implementation of this policy is the Clerk to the Parish Council, and she/he is required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the record series which it creates 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. 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.

Disposal procedures:

All documents that are no longer required for administrative reasons should be shredded, destroyed and disposed of and/or deleted.

Retention of Documents Schedule

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

Documents	Minimum Retention	Reason	Action
<i>Administrative/Management</i>			
Minutes	Indefinite	Archive	Archive SCDC
Agendas	5 years	Management	Destroy/Delete
Councillors Acceptance of Office	3 years	Management	Destroy/Delete
Councillors Declaration of Interests	3 years	Management	Destroy/Delete
<i>Financial</i>			
Annual Audited Accounts	Indefinite	Audit	Destroy/Delete
Annual Return	Indefinite	Audit	Destroy/Delete
Bank Statements	Indefinite	Audit	Destroy/Delete
Cheque Book Stubs	8 years	Audit	Destroy/Delete
Paying in books	8 years	Audit	Destroy/Delete
Quotations and tenders	8 years	Audit	Destroy/Delete
Invoices	8 years	Audit	Destroy/Delete
VAT Records	8 years	Audit	Destroy/Delete
Salary Records	8 years	Audit	Destroy/Delete
Tax and NI records	8 years	Audit	Destroy/Delete
<i>Insurance</i>			
Insurance Policies	25 years	Future Claims	Destroy/Delete
Certificate of Public Liability	25 years	Future Claims	Destroy/Delete
<i>Assets and Premises</i>			
Asset Register	6 years	Audit	
Title deeds, leases and contracts	Indefinite	Archive	Archive SCDC
<i>Electors</i>			
Register of Electors	Until there is no longer an administrative requirement.		Destroy/Delete
<i>Health and Safety</i>			
Risk Assessments	21 years	Future Claims	Destroy/Delete

Equipment and premises inspection records	21 years	Future Claims	Destroy/Delete
Accident/incident reports	21 years	Future Claims	Destroy/Delete
<i>Cemetery Records</i>			
Register of fees collected	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Register of burials	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Register/plan of grave spaces	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Register of purchased graves	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Applications for interment	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Applications for right to erect memorials	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Copy certificates of grant of exclusive right of burial	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Disposal certificates	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Certificates of burial	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Certificates of cremation	Indefinite	Local Authorities Cemeteries Order 1977 (SI 204)	N/A
<i>General correspondence</i>	Unless it relates to specific categories outlined in the policy, records will 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.		

Version History

The version history panel provides a history of the changes made to the document from the initial draft to the current version.

Version	Changes made	Date	Made by
0.1	Draft created	7 th September 2025	Clerk
1.0	Final agreed policy with corrections.	7 th October 2025	Clerk