HOPE WITH ASTON PARISH COUNCIL

Document Retention Policy

Reviewed and Adopted:

Date: 12th October 2026

Parish Council Minute: 097/26.2

Hope with Aston 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.

Scope

This policy applies to all records created, received or maintained by Hope with Aston Parish Council while carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Hope with Aston Parish Council and which are thereafter retained to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically by the Clerk and / or Parish Councillor. A small percentage of Hope with Aston Parish Council records may be selected for permanent preservation as part of the Councils archives and for historical research.

Responsibilities

Hope with Aston 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 records management is the Clerk, who will give guidance for good records management practice and will promote compliance with this policy so that information can be retrieved easily, appropriately and in a timely manner.

Individual Councillors and the Clerk may hold records in hard copy format or electronically at home or on their home computers. Individuals are strongly advised to undertake "weeding" and "housekeeping" on a regular basis. On resigning from the Council, Councillors should delete electronic records and securely destroy hard copies.

Since May 2026, all official communication with Parish Councillors has been conducted using dedicated email addresses (cllr.name@hopewithastonparishcouncil.gov.uk). Access to a councillor's individual account is revoked immediately upon their resignation.

Where documents are scanned and filed electronically, the paper copy should be retained for one month before shredding.

After electronic information is deleted the "recycling bin" should be emptied at least every 3 months.

Retention Schedule

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

Document Category	Medium	Minimum Retention Period	Reason	Disposal Method
Minutes and Correspondence				
Minutes of Council meetings	Paper	Indefinite	Archive	
Minutes of Council meetings	Website / Cloud	6 years	Management	Delete
Minutes of committee meetings	Paper	Indefinite	Archive	
Minutes of committee meetings	Website / Cloud	6 years	Management	Delete
Agendas of Council and committee meetings	Paper / website / Cloud	6 years	Management	Shred / delete
Correspondence and papers on important local issues	Paper	Indefinite	Archive	
Correspondence and papers on important local issues	Website / Cloud	6 years	Management	Shred / delete
Routine correspondence	Paper / Cloud	As long as useful	Management	Shred / delete
Employment				
Staff employment contracts	Paper / Cloud	6 years after ceasing employment	Management	Shred / delete
Staff payroll information	Paper / Cloud	6 years	Management	Shred / delete
Staff references	Paper / Cloud	6 years after ceasing employment	Management	Shred / delete

Application forms (interviewed – unsuccessful)	Paper / Cloud	6 months	Management	Shred / delete
Application forms (interviewed – successful)	Paper / Cloud	6 years after ceasing employment	Management	Shred / delete
Disciplinary files	Paper / Cloud	6 years after ceasing employment	Management	Shred / delete
Staff appraisals	Paper / Cloud	6 years after ceasing employment	Management	Shred / delete
Finance				
Budget information / precept	Cloud	5 years	Management	Delete
Scales of fees and charges	Paper / Cloud	6 years	Management	Shred / delete
Receipt and payment accounts	Paper / Cloud	6 years	VAT	Shred / delete
Bank statements	Paper / Cloud	6 years	Audit	Shred / delete
Cheque book stubs	No cheque book	Last completed audit year	Audit	N/A
Paid invoices	Paper / Cloud	6 years	VAT	Shred / delete
Paid cheques	No cheque book	6 years	Limitation Act 1980	N/A
Payroll records	Paper / Cloud	6 years	HMRC	Shred / delete
Petty cash accounts	No petty cash	Last completed audit year	Audit	N/A
Quotations and tenders	Paper / Cloud	6 years	Limitation Act 1980	Shred / delete
VAT records	Paper / Cloud	6 years	VAT	Shred / delete

Insurance				
Certificates for Insurance against liability for employees	Cloud	Indefinite	Management	
Certificates for Public Liability	Cloud	Indefinite	Management	
Insurance claim records	Cloud	6 years after policy end	Management	Delete
Health and Safety				
Accident forms	Cloud	3 years	Statutory	Delete
Risk assessment	Website Cloud	Website - until superseded Cloud - 3 years from update	Management	Delete
General Management				
Councillors contact details	Cloud	Duration of membership	Management	Delete
Councillors declaration of office	Cloud	2 years from resignation	Management	Delete
AGAR documents and published final accounts	Paper / Website / Cloud	Paper – 6 years Website – 6 years Cloud – indefinite	Management	Shred / delete
Policies and procedures	Website / Cloud	Website - until superseded Cloud - 3 years from update	Management	Delete

Title deeds, lease agreements	Paper / Cloud	Indefinite	Archive	
Contracts	Cloud	6 years	Limitation Act 1980	Delete
Email messages	Cloud	At end of useful life	Management	Delete
Email addresses	Cloud	At end of useful life	Management	Delete
Consent forms	Cloud	5 years	Management	Delete
Member GDPR Security Compliance Forms	Cloud	Duration of membership	Management	Delete