

## **Retention of Documents Policy**

Treverbyn Parish Council recognises that the effective management of its records can be achieved and audited by a process that conforms to its legal and regulatory obligations.

This document provides policy framework covers:

- Scope
- Responsibilities
- Retention schedule

### **Scope of the policy**

This policy applies to all records created, received or maintained by the Parish council in the process of carrying out its functions. Records are defined as all the documents which facilitate the business carried out by the Parish council and which are thereafter retained (for set periods) to provide evidence of its transactions and activities. These records may be created and maintained in hard copy or electronically. A small percentage of these records will be selected for permanent preservation of the Council's archives and 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 Clerk will have overall responsibility for this policy and will give guidance for good records management practice and promote compliance with this policy to ensure information not only can be easily retrieved, but appropriately and timely.

### **Retention Schedule**

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the length of time which the record needs to be retained and the action to be taken when it is of no further administrative use.

<b><u>Document</u></b>	<b><u>Location</u></b>	<b><u>Retention period</u></b>	<b><u>Disposal</u></b>
Signed minutes	Parish Office	Indefinite	n/a
Agendas	Parish Office	Indefinite	n/a
Correspondence	Parish Office	Max 3 years	confidential waste
Information CALC	Parish Office	Indefinite	n/a
Historical	Parish Office	Indefinite	n/a
Insurance	Parish Office	Whilst valid	confidential waste
Accident book	Parish Office	Indefinite	n/a
Health & Safety	Parish Office	Indefinite	n/a
Finance Accounts	Parish Office	Indefinite	n/a
Receipts	Parish Office	6 years audit	confidential waste
Statements	Parish Office	6 years audit	confidential waste
Invoices	Parish Office	6 years audit	confidential waste
Quotations	Parish Office	6 years audit	confidential waste
VAT records	Parish Office	6 years audit	confidential waste
Tax/ Ni records	Accountant	6 years audit	n/a
Asset register	Parish Office	Indefinite	n/a
Declaration of office	Parish Office	Term of office	confidential waste
Register of interests	Parish Office	Term of office	confidential waste
Deeds	Parish Office	Indefinite	n/a

### **Planning applications**

All planning applications and relevant decision notices are now available from Cornwall Council. There is no requirement to retain duplicates. All Parish Council recommendations in connection with these applications are recorded in the council minutes and are retained indefinitely.

