

PRESTON PARISH COUNCIL

Doc017 – Document Retention Policy

Adopted July 2026

Chair: Margaret Trinder

Document Retention Policy

This policy was reviewed and approved by Full Council in July 2026.

Prime objectives

Preston Parish Council recognises that the efficient management of its records is necessary to comply with legal and regulatory obligations and to allow for its effective management. This policy has been created to detail how the records maintained by the parish council are kept and when they should be destroyed.

Scope of the policy

This policy applies to all records, in all formats that are created, received or maintained by the parish council. 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

Preston Parish Council has a corporate responsibility to maintain its records in line with regulatory requirements. The person with overall responsibility for this maintenance is the Parish Clerk.

Relationship with existing policies

This policy should be read in conjunction with the parish council's

- Freedom of Information policy
- General data protection regulation policies

Retention schedule

Under the Freedom of Information Act 2000, the parish council is required to maintain a retention schedule which lays down the length of time certain record sets need to be retained. Preston Parish Council has adopted a policy in line with the National Association of Local Council's legal topic note LTN40 (Local Councils' documents and records).

Document	Minimum retention period	Reason / Act
Minute books	Indefinite	Archive / historical record
Asset register	Indefinite	Management
Scales of fees and charges	6 years	Management
Receipt and payment accounts	Indefinite	Archive
Receipt records of all kinds	6 years	VAT
Bank statements including deposit / savings accounts	Last completed audit year	Audit
Quotations and tenders	6 years	Limitation Act 1980 (as amended)
Paid invoices	6 years	VAT
VAT records	6 years	VAT
Insurance policies	While valid	Management

Certificate for Insurance against liability for employees	40 years from the date on which the insurance commenced or was renewed	The Employers' Liability (Compulsory Insurance) Regulations 1998 section 4. Management
Investments	Indefinite	Audit, Management
Title deeds, leases, agreements, contracts	Indefinite	Audit, Management
Members' allowances register	6 years	Tax, Limitation Act 1980 (as amended)
Local Plans and similar documents	Until they are no longer in force	Management
External magazines, journals and the like	1 year or for as long as they are useful	Management
Routine correspondence and emails	6 months after relevant issue is completed	Management
Correspondence from members of the public	Deleted once issue / query dealt with	Management
Parish Councillors • applications for co-option • declarations of acceptance of office • members register of interests	Term of office + 1 year	Management
Employees' records	Employment period + 6 years	Management

Policy adopted: July 2026

This policy will be reviewed at the first meeting of the fiscal year when a new Parish Council takes up office.

Next review: May 2027