Delabole Parish Council

Records Management Policy

Delabole 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 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.

Responsibilities

The Parish Council has a 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 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.

The Clerk must ensure that the records for which s/he is responsible are accurate and are maintained and disposed of in accordance with the Parish Council's records management guidelines.

Individual Councillors may hold records in hard copy format or electronically at home or on their home computers. If a Councillor considers that some of these documents are important in the context of the Parish Council's records, they should ensure that the Clerk retain a copy for the official record.

Individual Councillors are strongly advised to undertake "weeding" and "housekeeping" on a regular basis.

On resigning from the Council Councillors must delete electronic records they hold and destroy hard copy documents.

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

Schedule

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

Document	**Minimum retention**	**Reason**
Minute books	Indefinite	Archive
Annual accounts	Indefinite	Archive
Annual Return	Indefinite	Archive
Bank statements	7 years	Audit / management
Cheque book stubs	Last completed	Audit
Paying in books	Last completed	Audit
Quotations	7 years	Audit
Paid invoices	7 years	Audit/ VAT
VAT records	7 years	Audit / VAT
Salary records (inc tax and NI)	7 years	Audit
Insurance policies	Whilst valid	Audit
Certificate of Employers Liability	Whilst valid	Audit / legal

Certificate of public liability	40 years	Audit / legal
Assets register	Indefinite	Audit
Deeds and leases	Indefinite	Audit
Declaration of acceptance	Term of office plus one year	Management
Members' Register of Interests	Term of office plus one year	Management
Complaints	One year (unless ongoing)	Management
General information	Three months	Management
Routine correspondence and emails	Six months	Management

Adopted at a council meeting on October 13, 2026.