Corse Parish Council
Document Retention and Record Management Policy

Adopted: 3rd March 2026
Reviewed 5th May 2026

Introduction
Hartpury Parish Council recognise that the efficient management of records is necessary to comply with legal obligations and have effective overall management of the Parish Council.
This policy provides the framework through which effective management can be achieved and audited.

Scope
This policy applies to all records, documents and emails created or received by the Council while carrying out its functions.
The term 'record' refers to any document held by the Council therefore covering both electronic and paper copies alongside emails.

Responsibilities
The Council has a responsibility to maintain records and management in accordance with statutory guidelines and this policy.
The person with overall responsibility for adherence to this policy is the Clerk.
Staff who are responsible for records are responsible for ensuring they are accurate and up to date and disposed of in accordance with the Council's records management guidelines.
Councillors and volunteers who hold records have a duty to ensure those records are maintained and disposed of in accordance with the Council's record management guidelines.

Working with existing Policies
This policy has been created to work alongside the Councils other policies including:

- Publication Scheme
- Data Protection Policy
- IT Policy

And any additional relevant legislation and regulations that apply to Parish Councils.

Retention Schedule
Under the Freedom of Information Act 2000 the Parish Council is required to maintain a schedule listing the records it creates during its business, the length of time the record should be maintained and the action that should be taken when it is of no further administrative use.

Document	Minimum Retention	Reason
Statutory, Financial and Corporate		
Minutes of Council Meetings	Indefinite	Archive
Annual Accounts (including cashbooks)	Indefinite	Archive
Annual Return	Indefinite	Archive
Bank statements	6 years	Audit / Management
Cheque Book stubs	Last completed audit	Management
Receipt books of all kinds	6 years	Management
Paying in books	Last completed audit	Management
Scales of fees and charges	6 years	Management
Quotations and tenders	6 years	Audit / Limitation Act 1980 (as amended)
Paid invoices	6 years	Audit / VAT
VAT records	6 years	VAT
Salary records	12 years	Audit / Pension, NI & HMRC
Insurance policies & record of policies held maintained	Whilst valid	Audit / Management
Certificate for insurance against liability for employees	40 years	Audit / Management / Legal The Employers Liability (Compulsory Insurance) Regulations 1998)
Tree Survey Reports	40 years	Management / Insurance
Asset Register	Indefinite	Audit / Management
Title Deeds, Leases, Agreements, Contracts	Indefinite	Audit / Management
Maps, plans and surveys of property owned by the Council	Indefinite	Management
Burial Board		
Records of other bodies such as a burial board, charity, fire brigade, Home Guard unit, local society or ad hoc committee	Indefinite	Management
Any records dating from before 1894 now held by the town or parish council or parish meeting	Indefinite	Management
Employee Records		
Application forms Contracts of Employment Routine employee documentation	6 years from date of leaving (past employees) All documentation (current employees)	Personal injury claims, tribunal claims

Recruitment Records		
Application forms CV's Interview notes Supporting documents	6 months (from date of appointment)	Discrimination claim from applicants
Other Documentation		
Declaration of acceptance	2 years from end of term of office	Management/Legal
Members Register of Interests forms	2 years from end of term of office	Management/Legal
Complaints	1 year	Management
Routine correspondence and papers	End of administrative use	Management
Correspondence and papers on important local issues or activities	End of administrative use/indefinite	Management/Archive
Reports, Guides, Handbooks etc received from other organisations	End of administrative use	Management
Community magazines or newsletters	Indefinite – one copy of each issue	Archive
Press-cuttings books	Indefinite – no duty on Clerk to compile	Archive
Photographs	Indefinite – remember to date	Archive
Elections		
Nomination forms for candidates for election to the Parish/Town Council	6 months from close of poll	Management
Register of electors	End of administrative use	Management
Contractors		
Insurance	Current plus 1 year	Legal
Planning Papers		
Permission Granted All papers retained until development has been completed to allow Council to check that the development proceeds in accordance with the terms of the permission.		
Permission Refused All papers should be retained until the period in which an appeal can be made has expired. If a resulting appeal is dismissed, the documentation should be retained in case further applications relating to the same site result.		
Appeal Decisions These should be retained indefinitely as they may be required should there be longer term implications, e.g. the decision creates a precedent for other developments in the locality.		
Structure Plans and Local Plans These should be retained as long as in force.		

At the end of the minimum retention period the Council will dispose of the held records. For digital files this will be a permanent delete from all hardware and cloud storage, for physical files this will be by method of shredding and disposal.
All records are held by the Clerk on the Council laptop and cloud storage (digital files) or in a locked filing cabinet (physical files). Some records that are held indefinitely may be passed on to the County archives for secure long-term holding.