



# St Helen Without Parish Council

## Working for You

## Retention of Documents Policy

The 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.

### Responsibilities

The 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 the implementation of this policy is the Clerk to the Parish Council, and they are 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.

### Retention Schedule - Polices

Document Type	Examples	Retention Period	Retention Format	Disposal Method	Statutory/Best Practice Reference
<b>Governance &amp; Administration</b>	Minutes (signed paper copies)	Permanent	Paper + Digital PDF	Archive, do not destroy	Local Government Act 1972
	Agendas	5 years	Digital PDF	Secure delete	Best practice
	Reports & supporting papers	5 years	Digital/Paper	Secure shredding	Best practice
	Parish policies & standing orders	Until superseded + 1 year	Digital PDF	Secure delete	Recommended by NALC
<b>Financial Records</b>	Annual accounts & audit returns	Permanent	Digital & Paper	Archive	Accounts & Audit Regulations 2015
	Bank statements, paying-in books	7 years	Paper/Digital	Secure shredding	HMRC guidance

<b>Insurance</b>	Invoices & receipts	7 years	Paper/Digital	Secure shredding	HMRC guidance
	VAT records	6 years	Paper/Digital	Secure shredding	HMRC guidance
	Insurance policies (current & expired)	6 years after expiry	Digital/Paper	Secure shredding	Limitation Act 1980
	Insurance claims (successful & unsuccessful)	6 years after settlement	Digital/Paper	Secure shredding	Limitation Act 1980
<b>Human Resources</b>	Certificates of Employers' Liability	40 years	Digital & Paper	Archive, do not destroy	Employers' Liability (Compulsory Insurance) Regulations 1998
	Employee contracts	6 years after leaving	Paper/Digital	Secure shredding	Employment Rights Act 1996
	Payroll records	6 years	Digital/Paper	Secure shredding	HMRC guidance
<b>Planning</b>	Staff appraisals & HR notes	2 years	Digital	Secure delete	Best practice
	Parish responses to consultations	n/a	These are available at the District Council so are not required locally.	n/a	n/a
	Leases, deeds, licences	Permanent	Paper + Digital Scan	Archive, do not destroy	Limitation Act 1980
<b>Health &amp; Safety</b>	Risk assessments	3 years	Digital/Paper	Secure shredding	HSE guidance
	Accident books & incident reports	3 years after incident	Paper/Digital	Secure shredding	RIDDOR requirements
<b>Data Protection</b>	Subject Access Requests	2 years	Digital	Secure delete	UK GDPR
	Data breach records	6 years	Digital	Secure delete	ICO guidance

## Retention Schedule - Emails

Email Type	Examples	Recommended Retention	Rationale / Reference
<b>Routine / Informal</b>	General enquiries, meeting arrangements, invitations, admin updates	<b>Up to 6 months</b>	Best practice: delete once actioned unless there's a legal or operational reason to keep
<b>Operational / Project-based</b>	Emails relating to projects, events, community consultations	<b>1–2 years</b> (or until project closure)	Retain for audit trail and reference purposes
<b>Financial / Legal Impact</b>	Emails supporting invoices, contracts, complaints, FOI requests	<b>6 years</b>	Limitation Act 1980 & HMRC guidance if linked to financial records
<b>HR &amp; Staffing Emails</b>	Recruitment, grievances, disciplinary correspondence	<b>6 years after employment ends</b>	Employment Rights Act 1996
<b>Freedom of Information / Subject Access Requests</b>	Emails containing disclosure material	<b>2 years after resolution</b>	ICO guidance & GDPR accountability
<b>Newsletters &amp; Notifications</b>	Mailing list subscriptions, event updates	<b>Delete after use</b>	No operational or legal need to retain