



St Helen Without Parish Council

Working for You

Retention of Documents Policy

Approved at a meeting of the Council on 22nd September 2025

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 - Documents

Document Type	Examples	Retention Period	Retention Format	Disposal Method	Statutory/Best Practice Reference
Governance & Administration	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	Parish policies & standing orders	Until superseded + 1 year	Digital PDF	Secure delete	Recommended by NALC

Document Type	Examples	Retention Period	Retention Format	Disposal Method	Statutory/Best Practice Reference
Financial Records	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
	Invoices & receipts	7 years	Paper/Digital	Secure shredding	HMRC guidance
	VAT records	6 years	Paper/Digital	Secure shredding	HMRC guidance
Insurance	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
	Certificates of Employers' Liability	40 years	Digital & Paper	Archive, do not destroy	Employers' Liability (Compulsory Insurance) Regulations 1998
Human Resources	Employee contracts	6 years after leaving	Paper/Digital	Secure shredding	Employment Rights Act 1996
	Payroll records	6 years	Digital/Paper	Secure shredding	HMRC guidance
	Staff appraisals & HR notes	2 years	Digital	Secure delete	Best practice
Planning	Parish responses to consultations	n/a	These are available at the District Council so are not required locally.	n/a	n/a
Legal Documents	Leases, deeds, licences	Permanent	Paper + Digital Scan	Archive, do not destroy	Limitation Act 1980
Health & Safety	Risk assessments	3 years	Digital/Paper	Secure shredding	HSE guidance

	Accident books & incident reports	3 years after incident	Paper/Digital	Secure shredding	RIDDOR requirements
Data Protection	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
Routine / Informal	General enquiries, meeting arrangements, invitations, admin updates	Up to 6 months	Best practice: delete once actioned unless there's a legal or operational reason to keep
Operational / Project-based	Emails relating to projects, events, community consultations	1–2 years (or until project closure)	Retain for audit trail and reference purposes
Financial / Legal Impact	Emails supporting invoices, contracts, complaints, FOI requests	6 years	Limitation Act 1980 & HMRC guidance if linked to financial records
HR & Staffing Emails	Recruitment, grievances, disciplinary correspondence	6 years after employment ends	Employment Rights Act 1996
Freedom of Information / Subject Access Requests	Emails containing disclosure material	2 years after resolution	ICO guidance & GDPR accountability
Newsletters & Notifications	Mailing list subscriptions, event updates	Delete after use	No operational or legal need to retain