

HALSALL PARISH COUNCIL

Review / Change Date	Description
June 2025	Halsall Parish Council Document Retention Policy adopted
Feb 2026	Add Plaud transcript for meetings

Document Retention Policy

Introduction

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.

This document provides the policy framework through which this effective management can be achieved and audited. It covers:

- 1. Scope of the Policy**
- 2. Responsibilities**
- 3. Retention Schedule**

1. Scope of the policy

This policy applies to all records created, received or maintained by the Parish Council in 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.

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the County Council's archives and for historical research.

2. 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 who is 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.

3. Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the documents which it uses. The retention schedule lays down

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the length of time which these documents need to be retained and what action should be taken when a document 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 documents regardless of the media in which they are stored.

Retention of Documents			
Document	Minimum Retention	Reason	Action
Minutes of Meetings	Indefinite		Archive
Annual Audited Accounts	Indefinite		Archive
Annual Return	Indefinite		Archive
Asset Register	Indefinite	Audit	Archive
Deeds, Leases	Indefinite		Archive
Cert of Employees Liability	40 Years	Audit & Legal	Destroy
Cert Public Liability (Cert. & Claims- not invoices)	40 Years	Audit & Legal	Destroy
Other Insurance Policies	Whilst Valid	Audit	Destroy
Tax & NI Records	12 Years	Audit	Destroy
Bank Statements	6 Years	Audit	Destroy
Quotations	6 Years	Audit	Destroy
Paid Invoices	6 Years	Audit & VAT	Destroy
VAT Records	6 Years	VAT	Destroy
Salary Records	6 Years	Audit	Destroy
Cllrs Declaration of Office	Term of Office	Management	Destroy
Members Interests	Term of Office	Management	Destroy
Cheque Book Stubs	After Annual Audit	Management	Destroy
Paying in Books	After Annual Audit	Management	Destroy
Risk Assessments	Once superseded	Management	Destroy
Register of Electors	Once updated	Management	Destroy
Other general information	12 months	Management	Destroy
Other Planning information*	12 months	Management	Destroy
Plaud transcripts	28 days	Minutes published	Destroy
* All planning applications and comments are retained by Borough Council so all information can be destroyed after each year.			

All documents that are no longer required for administrative reasons should be shredded and disposed of.

Lancashire County Council Archives will be consulted if any further clarification of these or other documents is required.

Reviewed at Parish Council Meeting on 11th June 2025

Signed (Chair)