



DOCUMENT RETENTION POLICY

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BEMBRIDGE PARISH COUNCIL

DOCUMENT RETENTION POLICY

1. Introduction

The council recognises the need to retain documentation for audit purposes, staff management, tax liabilities and the eventuality of legal disputes and proceedings.

The table identifies when the retention period of records is due to expire and how immediate action will be taken to ensure the disposal of documents is undertaken in a proper and secure manner.

When the information reaches the expiry date for retention, the Council will ensure that all copies of that information are permanently destroyed. Paper copies by shredding, electronic data by electronic erasing and CD / DVD by registered waste disposal operator.

2. Document Retention Table

Document	Min Retention Period	Reason
Minutes	Indefinite	Archive
Agendas	6 years	Management
Accident/incident Reports	20 years	Potential Claims
Scales of fees and charges	6 years	Management
Receipt & payment accounts	Indefinite	Archive
Receipt books of all kinds	6 years	VAT
Bank statements including deposit/saving accounts	Last completed audit year	Audit
Bank paying in books	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Quotations and tenders	6 years	Limitation Act 1980 (as amended)
Paid Invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980 (as amended)
VAT records	6 years (20 years for VAT on rents)	VAT
Petty cash, postage and telephone books	6 years	Tax, VAT, Limitation Act 1980 (as amended)
Timesheets	3 years from last completed audit	Audit (requirement), Personal injury (best practice)
Wages books/payroll	12 years	Superannuation
Personnel Files	12 months after they cease to be employed	Management
Pension Information	2 years after they cease to be employed	Management
Insurance policies	While valid	Management

	(certificates for insurance)	
Insurance company names and policy numbers	Indefinite	Management
Certificates for insurance against liability for employees	40 years from date on which insurance commenced/renewed	The Employers' Liability (compulsory insurance) Regulations 1998 (SI 2753) Management
Steyne Park equipment inspection reports	21 years	Management
Parish Tree Reports	21 years	Management
Cemetery Topple Tests	21 years	Management
Property Deeds/Leases	Within term of lease	Management
Councillors contact details and Register of Interest	Term of office	Management
For recreation grounds • Application for hire • Lettings diaries • Copies of bills to hirers • Record of tickets issued	6 years	VAT
For burial grounds • Register of fees collected • Register of burials • Register of purchased graves • Register/plan of grave spaces • Register of memorials • Application for internment • Application for rights to erect memorials • Disposal certificates • Copy certificates of grant of exclusive right of burial	Indefinite	Archives, Local Authorities Cemeteries Order 1977

Information not contained within the data retention table above will be deleted or disposed of.