
FELTHORPE PARISH COUNCIL
RECORDS RETENTION POLICY

Introduction

This policy covers both paper and electronic files. It is acceptable to retain only an electronic file in many circumstances, however those records bearing a signature or other official mark must be either scanned, or filed in original paper format, to ensure that the signature or official mark is retained.

Record	Retention Period	Notes
Accounts – Annual Audit Return	Indefinite	
Accounts – Invoices / Vouchers	7 years from end of the relative financial year	For VAT purposes.
Agendas	5 years	
Audit Reports – Internal & External	Indefinite	
Bank Statements	7 years from end of the relative financial year	
Budgets	5 years	
Cash books	7 years	For VAT
Complaints	10 years	Unless otherwise advised by a legal representative

Reviewed: July 2020

Next review date: July 2024

Contracts – council as customer	10 years from completion	
Contracts – council as supplier	10 years from termination	
Councillor contact details	1 year after leaving Council	
Debtors records	7 years from discharge of debt	
Deeds of Title	Indefinite	
Delivery Notes	2 months	Until payment of invoice is made
Employment Records – major	7 years after Subject leaves service (7 years from end of the relative financial year)	Payroll, pension, HMRC
Employment Records - Minor	2 years annual leave records, contract etc	
Estimates	1 year	
Expense claims	7 years	
General correspondence / emails	Deleted when dealt with	Unless links to an ongoing matter
Inspection records eg assets	Lifetime of item	
Insurance policies	Indefinite	
Job applications – unsuccessful applications	3 months	
Members allowance register	6 years	
Minutes – Full Council & Advisory Groups	Indefinite	Full Council and formal committees – signed copy to be kept in paper format. Advisory Groups – copy to be kept electronically.

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Minutes – working parties	5 years after completion of subject matter	
Parishioner contact details (when responding to a one-off enquiry)	As soon as dealt with / maximum three months	
Parishioner correspondence that needs to be kept for a specified reason	Two years after receipt of enquiry / complaint	As long as a privacy statement has been received
PAYE records	6 years	
Planning Applications	N/A - View on Broadland Council website and in Council minutes	
Reports – Annual Parish Report	Indefinite	Archive of Council's activities
Reports – Meetings (major)	Indefinite	
Reports – Meetings (minor)	Indefinite	
Serious Incident Files	Indefinite	
Software Licences	Lifetime of software	
Tender	7 years (for successful tender, 1 year for unsuccessful)	
Training records	2 years following termination of appointment	
VAT records	7 years	

Reviewed: July 2020

Next review date: July 2024