

Brocton Parish Council
Appendix A: List of Documents for Retention or Disposal

Document	Minimum Retention Period	Reason	Location Retained	Disposal
Minutes	Indefinite	Archive	Clerk's filing/Brocton village church – lockable filing cabinet.	Original signed paper copies of Council minutes of meetings must be kept indefinitely in safe storage. At regular intervals of not more than 5 years they must be archived and deposited with SCC Records Office
Agendas	5 years	Management	Parish Council's laptop	Deleted from laptop and deleted from deleted items.
Accident/incident reports	20 years	Potential claims	Clerk's filing/Brocton village church – lockable filing cabinet.	To be shredded.
Receipt and payment accounts	Indefinite	Archive	Clerk's filing/ Brocton village church – lockable filing cabinet.	N/A
Bank statements including deposit/savings accounts	Last completed audit year	Audit	Clerk's filing	To be shredded
Bank paying-in books	Last completed audit year	Audit	Clerk's filing	To be shredded
Cheque book stubs	Last completed audit year	Audit	Clerk's filing	To be shredded
Quotations and tenders	6 years	Limitation Act 1980 (as amended)	Clerk's filing/Brocton village church – lockable filing cabinet.	To be shredded.

Document	Minimum Retention Period	Reason	Location Retained	Disposal
Paid invoices	6 years	VAT	Clerk's filing/Brocton village church – lockable filing cabinet.	To be shredded
VAT records	6 years	VAT	Parish Council's laptop	Deleted from laptop and deleted from deleted items.
Postage books	6 years	Tax, VAT, Limitation Act 1980 (as amended)	Clerk's filing	To be shredded
Insurance policies	While valid (but see next two items below)	Management	Clerk's filing	To be shredded
Insurance company names and policy numbers	Indefinite	Management	Brocton village church – lockable filing cabinet.	N/A
Certificates for insurance against liability for employees	40 years from date on which insurance commenced or was renewed	The Employers' Liability (Compulsory Insurance) Regulations 1998 (SI 2753) Management	Brocton village church – lockable filing cabinet.	To be shredded
Annual Park Inspection Report	21 years	Management	Clerk's filing/Brocton village church – lockable filing cabinet	To be shredded
Title deeds, contracts	Indefinite	Audit, Management		N/A
Information from other bodies e.g. circulars from county associations, NALC, principal authorities	Retained for as long as it is useful and relevant		With Clerk	Bin
Local/historical information	Indefinite – to be securely kept for benefit of the Parish	For local interest/retention of historical events/facts.	Brocton village church – lockable filing cabinet	N/A

Document	Minimum Retention Period	Reason	Location Retained	Disposal
Paperchase	To be retained as long as useful and relevant – dispose of every 2 years	Copy lodged with British Library Board (which manages and controls the British Library), in line with the Legal Deposit Libraries Act 2003, through website.	With Clerk	Bin spare copies, as required.
Record-keeping				
To ensure records are easily accessible it is necessary to comply with the following: <ul style="list-style-type: none"> • A list of files stored in cabinets will be kept • Electronic files will be saved using relevant file names 	The electronic files will be backed up periodically (monthly) on a portable hard drive.	Management	With Clerk – files in cabinet. Brocton village church – lockable filing cabinet. Electronic files – on Parish Council laptop.	Documentation no longer required will be disposed of, ensuring any confidential documents are shredded. A list will be kept of those documents disposed of to meet the requirements of the GDPR regulations.
General correspondence	Unless it relates to specific categories outlined in the policy, correspondence, both paper and electronic, should be kept. Records should be kept for as long as they are needed for reference or accountability purposes, to comply with regulatory requirements or to protect legal and other rights and interests	Management	With Clerk	To be shredded.
Correspondence relating to staff	If related to Audit, see relevant sections above. Will be kept securely and personal data will only be retained if required. Max retention period is 3 years. Likely time limits for tribunal claims between 3–6 months	Provision of references; tax payments, NI contributions, pensions and for dealing with any legal claims.	Clerk's filing	To be shredded. A list will be kept of those documents disposed of to meet the requirements of the GDPR regulations.

Document	Minimum Retention Period	Reason	Location Retained	Disposal
Planning Papers				
Applications	1 year	Management	With Clerk	To be shredded
Appeals	1 year unless significant development	Management	With Clerk	To be shredded
Trees	1 year	Management	With Clerk	To be shredded
Local Development Plans	Retained as long as in force	Reference	Brocton village church – lockable filing cabinet	To be shredded
Local Plans	Retained as long as in force	Reference	Brocton village church – lockable filing cabinet	To be shredded
Town/Neighbourhood Plans	Indefinite – final adopted plans	Historical purposes	Brocton village church – lockable filing cabinet	N/A