



# Stapleford Abbots Parish Council

## RETENTION POLICY

**Version: 1.1**

**June 2023**

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### **A Scope**

This policy applies to the Stapleford Abbots Parish Council. Where the term ‘staff’ is used, this includes any staff (paid and voluntary) working for the Council. This policy is aimed at all Councillors and staff working for Stapleford Abbots Parish Council.

### **B Confidential Notice & Intellectual Property**

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### **C Document Details**

|                          |                                                                                  |
|--------------------------|----------------------------------------------------------------------------------|
| <b>Policy</b>            | <i>Retention Policy</i>                                                          |
| <b>Policy Statement</b>  | <i>This document sets out a Retention Policy for use by Stapleford Abbots PC</i> |
| <b>Version Number</b>    | <i>1.1</i>                                                                       |
| <b>Version Date</b>      | <i>05/2023</i>                                                                   |
| <b>Review Date</b>       | <i>01/04/2024</i>                                                                |
| <b>Author</b>            | <i>J Jackson</i>                                                                 |
| <b>Responsible Owner</b> | <i>Stapleford Abbots Parish Council</i>                                          |
| <b>Approving Body</b>    | <i>Stapleford Abbots Parish Council</i>                                          |

## **D**                    **Revision History**

| <b>Version</b> | <b>Revision Date</b> | <b>Details of Changes</b> | <b>Author</b> |
|----------------|----------------------|---------------------------|---------------|
| 1.1            | 01/06/2021           | Current version           | J Jackson     |
| 1.1            | 01/06/2022           | Current version           | J Jackson     |
| 1.1            | 01/06/2023           | Current version           | J Jackson     |

## **E**                    **Freedom of Information**

If requested, this document may be made available to the public and persons outside the Council as part of Stapleford Abbotts Parish Council’s commitment to transparency and compliance with the Freedom of Information Act.

## **F**                    **Accessibility**

This document can be made available in other styles, formats, sizes, languages and media in order to enable anyone who is interested in its content to have the opportunity to read and understand it. Any such requests should be made to the Clerk.

## **G**                    **Dissemination**

This policy will be disseminated to all staff. All staff will have to read this policy at publication and every time there is an update or change to the policy. The Stapleford Abbotts Parish Councillors will have the overall responsibility for implementing the policy.

## **H**                    **Review**

This policy will be reviewed every year or when new evidence, policy or guidelines come to light necessitating an update / change. The policy review and update will be the responsibility of the Stapleford Abbotts Parish Council.

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The minimum Retention Policy Period is based on guidance from the EALC.

| Item                                                  |   | Minimum Retention Period | Reason from EALC                      |
|-------------------------------------------------------|---|--------------------------|---------------------------------------|
| Agenda Council Meetings                               | √ | 2 Years                  | Audit                                 |
| Agenda-Non Council Meetings                           |   | 3 Years                  | Audit                                 |
| Asset Register                                        |   | Indefinite               | Audit                                 |
| Bank Statements                                       | √ | 6 Years                  | Statue of Limitation                  |
| Bank Paying books                                     |   | 6 Years                  |                                       |
| Cheque Book Stubs                                     |   | 6 Years                  |                                       |
| Cheque Paid                                           | √ |                          |                                       |
| Surveys                                               | √ | 3 years results only     | VAT                                   |
| Grant Applications by S.A.P.C                         | √ | 6 Years                  | Audit, Management                     |
| Grant Applications to S.A.P.C                         | √ | 6 Years                  | Management                            |
| Invoices Paid                                         |   | 6 Years                  |                                       |
| Investments                                           | √ | Indefinite               | Tax, Statue of Limitation             |
| Insurance Policies SAPC                               | √ | 6 Years                  |                                       |
| Letters – general correspondence                      | √ | 3 Years                  |                                       |
| Members Allowance Register                            | √ | 6 Years                  |                                       |
| Declaration of Office                                 | √ | Indefinite               |                                       |
| Members Allowance Register                            |   | 6 Years                  |                                       |
| Members Declaration of Interest                       |   | Indefinite               |                                       |
| Minutes & Minute Book                                 | √ | Indefinite               |                                       |
| Minutes/notes handwritten (includes notes by members) | √ | Until Minutes agreed     | TAX, VAT, SOL<br>Statue of Limitation |
| Planning Application                                  | √ |                          |                                       |
| Postage                                               | √ | At least 5 years         |                                       |
| Quotations & Tenders-Successful                       |   | 6 years                  | Public Liability                      |
| Quotations & Tenders-UnSuccessful                     |   | 12                       |                                       |
| Risk Assessments                                      | √ | years/indenfinite        | Audit & Working Time                  |
| Standing Orders                                       | √ | Life of Tender           | Regs                                  |
| Timesheets (Clerk)                                    | √ |                          | Audit Management                      |
| Title Deeds, Leases, Agreements, Contracts            | √ | 25 years                 |                                       |
| VAT Records                                           | √ | 2 Years                  | VAT                                   |
|                                                       | √ | Indefinite               |                                       |
|                                                       | √ | 6 Years                  |                                       |
|                                                       | √ |                          |                                       |