Batheaston Parish Council

Records Retention Policy

Batheaston
Where *community* matters

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This Policy is provided for approval by the Finance Committee at its meeting held on 2nd December 2025.

1. Introduction

Batheaston 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 association. This document provides the policy framework through which this effective management can be achieved and audited.

It covers:

- Scope
- Responsibilities
- Retention Schedule

2. Scope

This policy applies to all records created, received or maintained by Batheaston Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Batheaston 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

Batheaston Parish Council records may be selected for permanent preservation as part of the Council's archives and for historical research.

3. Responsibilities

Batheaston 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 this policy is the Clerk. The person responsible for records management will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and timely. Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Batheaston Parish Council's records management guidelines.

4. Retention Schedule

The retention schedule refers to record series regardless of the media in which they are stored.

Document	Minimum Retention Period	Reason
Minutes		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
Employment		
Staff employment contracts	6 years after ceasing employment	Management
Staff payroll information	3 years	Management
Staff references	6 years after ceasing employment	Management
Application forms (interviewed – unsuccessful)	6 months maximum (destroy)	Management
Application forms (interviewed – successful)	6 years after ceasing employment	Management
Disciplinary files	6 years after ceasing employment	Management

Staff appraisals	6 years after ceasing employment	Management
Finance		
Scales of fees and charges	6 years	Management
Receipt and payment accounts	Indefinite	Archive
Bank statements	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980
Payroll records	6 years + current year	HMRC
Petty cash accounts	6 years	VAT
Insurance		
Insurance policies	6 years after policy end	Management
Certificates for Insurance against liability for employees	6 years after policy end	Management
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
Health and Safety		
Accident books	3 years from date of last entry	Statutory
Risk assessment	3 years	Management
Play equipment inspection reports	21 years	Insurance claims
General Management		
Councillors contact details	Duration of membership	Management
Lease agreements	12 years	Limitation Act 1980

Contracts	6 years	Limitation Act 1980
Email messages	At end of useful life	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management

Approved at Finance Committee 2/12/25

Next scheduled review: May 2026.