

Hinton St George Parish Council

Retention of Documents Policy

May 2026

Hinton St George Parish Council (“the 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 council. This document provides the policy framework through which this effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Retention Schedule

1. Scope of the policy

- a. This policy applies to all records created, received or maintained by the Council in the course of carrying out its functions.
- b. Records are defined as all those documents which facilitate the business carried out by the 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.
- c. A small percentage of the Council’s records will be selected for permanent preservation as part of the Council’s archives and for historical research.

2. Responsibilities

- a. The Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment.
- b. The person with overall responsibility for the implementation of this policy is the Clerk to the Council, and they are required to manage the Council’s records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

3. Retention Schedule

- a. Under the Freedom of Information Act 2000, the Council is required to maintain a retention schedule listing the record series which it creates in the course of its business.
- b. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

- c. The Clerk is expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when creating new record keeping systems.
- d. This retention schedule refers to record series regardless of the media in which they are stored.
- e. All documents stored in the Clerk's home should be stored in water, air and dust tight containers.

Retention Schedule:

Document	Minimum Retention Term	Reason for Retention	Location
Minute Books	Indefinite	Archive	Clerk's Home / Somerset Heritage
Annual Accounts	Indefinite	Archive	Clerk's Home / Somerset Heritage
Annual Return	Indefinite	Archive	Clerk's Home / Somerset Heritage
Bank Statements	7 years	Audit / Management	Clerk's Home
Cheque book stubs	Last completed	Audit / Management	Clerk's Home
Paying in books	Last completed	Audit / Management	Clerk's Home
Quotations	7 years	Audit	Clerk's Home
Paid invoices	7 years	Audit / VAT	Clerk's Home
VAT records	7 years	Audit / VAT	Clerk's Home
Salary records	7 years	Audit	Clerk's Home
Tax & NI records	7 years	Audit	Clerk's Home
Insurance policies	Whilst valid	Audit	Clerk's Home
Employer's liability	40 years	Audit / legal	Clerk's Home / Somerset Heritage
Public liability	40 years	Audit / legal	Clerk's Home / Somerset Heritage
Assets register	Indefinite	Audit	Clerk's Home / Somerset Heritage
Deeds, leases	Indefinite	Audit	Clerk's Home / Somerset Heritage

Planning Applications:

- f. All planning applications and relevant decision notices are available at Somerset Council. There is no requirement to retain duplicates locally.
- g. All Council recommendations in connection with these applications are recorded in the Council minutes and are retained indefinitely and noted against applications with Somerset Council.

Council Documents:

- h. Council documents should be retained as follows:
 - i. Declarations of acceptance: retained for the term of office plus 1 year
 - ii. Councillors' register of interests' book: retained for the term of office plus 1 year
- i. These documents should be made available on the Parish Council website and the Somerset council website.

Other:

- j. Other documents should be retained in electronic format on the Council laptop and backed up in mailbox storage:
 - i. Complaints: 1 year
 - ii. General information: 3 months
 - iii. Routine correspondence and emails: 6 months

4. Disposal procedures

- a. All documents that are no longer required for administrative reasons should be shredded and disposed of.

For further information contact the Clerk to Hinton St George Parish Council:

Clerk: Helen Graham
Contact: clerk@hintonstgeorgeparishcouncil.gov.uk / 07824 333493
Website: <https://hintonstgeorgeparishcouncil.gov.uk>

Date of policy review: 18 May 2026 (Annual Parish Council Meeting)

Approved by: Hinton St George Parish Council