

## Charney Bassett Parish Council

### Document Retention and Archive Policy

This policy explains how the Parish Council will retain or dispose of records that are created, received or maintained in the carrying out of its functions. Records are documents which facilitate the business carried out by the Parish Council. They provide evidence of the transactions or activities undertaken and may be created, received or maintained in hard copy or electronically.

The policy sets the minimum period within which documents will be retained. The Parish Council has an active History Group that maintains an impressive on-line record of the village's history. Where it is felt that a record adds value to that archive, it may be retained irrespective of the minimum periods set in the table below. Paper records of historic significance may be retained at the Berkshire County Archive Centre<sup>1</sup>

The Parish Clerk is responsible for managing the Council's records in compliance with this policy, so that information can be retrieved easily, appropriately and in a timely manner.

This policy has regard to:

- The Freedom of Information Act 2000;
- Data Protection; and,
- Other legislation and regulations (including audit and Statute of Limitations).

The table below sets out how specific records will be retained.

Document	Retention Period	Reason
Parish Council Minutes	Indefinite	Archive
Legal documents (incl. leases, deeds, agreements)	Indefinite	Archive Sound Management
Insurance Policies (Liability etc)	3 years	Sound Management
Insurance Policies (Employment)	40 years	Legal Requirement <sup>2</sup>
Councillors' Allowances Register	6 years	Legal Requirement <sup>3</sup>
Scale of Fees and Charges	6 years	Management
Investments	Indefinite	Audit/Management
Quotations/Tenders	6 years	Legal Requirement <sup>4</sup>
Receipts and Payments Account	Indefinite	Archive
Annual Audit Return (AGAR)	Indefinite	Archive
Bank Statements	2 years	Audit
Paying-in book/cheque stubs	2 years	Audit
Salary Records	12 years	Superannuation
Paid Invoices/Receipts	6 years	VAT
Paid Cheques/Paying-in Records	6 years	Legal Requirement <sup>5</sup>
VAT Records	6 years	VAT
Allotment Layout Record	Indefinite	Archive

<sup>1</sup> Charney Bassett moved from Berkshire to Oxfordshire in 1974 but records have continued to be held in the Berkshire archive. The Archivist decides whether or not to accept a record for safe keeping.

<sup>2</sup> The Employers' Liability (Compulsory Insurance) Regulations 1998 (SI 2753)

<sup>3</sup> Tax, Limitation Act 1980 (as amended)

<sup>4</sup> Limitation Act 1980 (as amended)

<sup>5</sup> Limitation Act 1980 (as amended)

## **Planning Papers**

The Parish Council is consulted by the Planning Authority on planning applications. The Parish Council used to receive paper plans but consultation is now undertaken electronically. Historic application details (forms, plans and support documents) are now all held on-line on the Planning Authority website. Previous paper records of planning applications are therefore no longer held by the Parish Council.

The Parish Council maintains a register of applications submitted in its area to include:

- Summary of the development proposed;
- The application reference number and site location;
- A summary of the Parish Council's comment (and date made);
- The Planning Authority's decision (and date made);
- Summary of any appeal decision.

## **General Documentation (including emails)**

An annual review of documentation will be carried out.

As a general rule, correspondence will be kept for 3 years and those that are no longer required will be shredded/deleted and otherwise disposed of.

Emails will also be deleted after 3 years unless the content of longer-term relevance and commits the Parish Council in some way (e.g. an agreement with a third party to use land in a certain way).

Approved by the Parish Council at the meeting of 11<sup>th</sup> March 2026 (minute CBPC/26/28).