Hockley Heath Parish Council

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Retention of Documents and Records Policy

For Hockley Heath Parish Council

Version: 2.0

Dated: May 2026

Document Information

Title	Retention of Documents and Records Policy
Owner	Hockley Heath Parish Council
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Document History

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1. Introduction
2. Scope of the policy
3. Responsibilities
4. Retention Schedule

1. Introduction

Hockley Heath Parish Council recognise that 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 Parish Council.

This document provides the policy framework through which this effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Relationships with existing policies
- Retention Schedule

2. Scope of the policy

This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Parish Council and which are thereafter retained (for a set period) to provide evidence of its transactions or activities.

These records can take many different forms, e.g.,

- Letters received from third parties
- Copy letters which have been sent out
- File attendance notes
- Invoices
- Minutes
- Completed application forms
- Plans/drawings
- Financial records
- Registers
- Contracts/deeds
- Email communications (and any attachments)
- Photographs

With the exception of the Minutes, Annual Returns and associated financial information, and Insurance Policies all the remaining records/information are held in electronic form.

Retention of specific documents may be necessary to:

- Fulfil statutory or other regulatory requirements

- Evidence events/agreements in the case of disputes
- Meet operational requirements
- Ensure the preservation of documents of historic or other value

The untimely destruction of documents could cause the Council:

- Difficulty in defending litigious claims
- Operational problems
- Embarrassment
- Failure to comply with the Freedom of Information or Data Protection Acts

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

3. Responsibilities

The 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 Parish Clerk 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. The Clerk must also ensure that records are accurate, and are maintained and disposed of in accordance with the Parish Council's records management guidelines.

4. Retention Schedule

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.

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

Retention Schedule – All held electronically

**Also held in hard copy*

Document	Minimum Retention	Reason
General Admin		
Minutes*	Indefinite	Legal requirement
Agendas	Indefinite	To support the minutes
Correspondence	Indefinite	For reference
Reports and papers	Indefinite	For reference
Notes from meetings	Shredded after type up	These are not legal record and could be requested under FOI
Routine correspondence	Ten years	For reference
Emails	See email privacy notice	
Finance		
Invoices	Indefinite	VAT inspections / audit
VAT records	Indefinite	VAT inspection
Employee financial info	Two years after employee leaves	Recommended by SLCC
Management receipts / payments	Indefinite	Future reference
Annual Returns*	Indefinite	Legal requirement
Bank Statements* (and cheque stubs)	Ten years	Recommended by SLCC
Contracts*	Ten years	Should a claim be brought
Audit budgetary control	Ten years	For reference
Quotations and tenders	Five years	Reference only
Health and Safety		
Insurance certificates and policies*	Indefinite	Should a claim arise
Insurance claim records	Indefinite	Should a claim arise
All inspection records	Indefinite	Should a claim arise
Title, deeds etc*	Indefinite whilst owned by council	Legal requirement
Other		
Members' register of interests	Destroyed after member ceases to be a member	Only current info required
Newsletters from outside bodies	Retained as long as useful	For reference
Planning applications	Not retained – available from external source	
Council newsletters	Indefinite	For reference