



Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Retention Policy

Adopted by Appleton Parish Council by resolution on 18 June 2024 (minute 8) and will be reviewed periodically thereafter.

Reviewed: 21 April 2026 (8)

It is not possible for the Parish Council to keep all information forever. Therefore, in line with the Parish Council's Records Management Policy, it will be either destroyed or archived.

The Parish Council will only keep data for as long as it is necessary and data retention policy as follows;

<u>General Records</u>	<u>Minimum Retention Period</u>	<u>Reason/ where kept</u>
Signed Minutes of Parish Council meetings and Committees (Draft minutes destroyed when signed)	Indefinite	Last three years on website. Prior minutes archived at Chester Record Office.
Reports and other documents	5 years	Reviewed each year and deleted after five years.
Agendas	5 years	Reviewed each year and deleted after five years.
Draft Minutes	Destroy when Minutes approved	
Policy documentation including Standing Orders and Financial regulations	Keep current copy. Retain for at least 6 years for audit trail, governance and legal challenge purposes.	One drive
Councillors' Declarations of Office	Term of office and One year	One drive
Register of members interests	Duration of Office + 1 year	One drive
Co-option applications	Deleted after successful co-option and voting papers shredded upon co-option.	One drive
Title Deeds	Indefinite	Kept in safe
Documents for legal purposes • Breach of Trust • Contract • Defamation • Leases	Category Limitation period • None • 6 years • 1 year • 12 years	

• Negligence • Personal injury • Rent • Sums recoverable by statute • To recover land	• 6 years • 3 years • 6 years • 6 years • 12 years	
Correspondence via letter	2 years	Review and destroy after two years.
Emails – this includes all @appletonparish.gov.uk email addresses including official Parish Councillor email addresses	Routine correspondence 2 years, relating to decisions/contracts 6 years.	Email system
Press Releases	6 years	
Public Consultation: surveys etc	5 years	
Tenancy agreements for Parish Hall	6 years	One drive
Safety inspections	6 years	One drive
Accident/Incident report	20 years	
Risk Assessments	3 years	

<u>Financial Records</u>	<u>Minimum Retention Period</u>	<u>Reason/ where kept</u>
Audited Accounts	Indefinite	
VAT Records	6 years, excepting 20 years for VAT on rents	
Accounting records (including VAT records)	6 years	Limitation Act 1980 (as amended)
Bank statements including paying in books/cheque books	6 years	One drive
Van records	Valid documentation only	One drive
Quotes and tenders including unsuccessful quotes/tenders	6 years	One drive
Paid and Sent Invoices and Purchase Orders	6 years	
Payroll records	12 years	Payroll system
Petty cash, postage and telephone books	6 years	
Asset register	Indefinite	Continuously updated
Planning application correspondence received from residents	6 years, to align for challenges period.	

Parish and Neighbourhood Plans and similar documents	As long as they are in force plus 5 years	Management
--	---	------------

<u>Employment</u>	<u>Minimum Retention Period</u>	<u>Reason/ where kept</u>
Timesheets	3 years	One drive
Recruitment documentation and applications (unsuccessful)	6 months, unless retained by consent for future vacancies.	One drive
Recruitment documentation and applications (successful)	6 years after employment ceases	
Personnel and payroll records	Personnel 6 years. Payroll 12 years. (Retain pension related documents for a longer period only if necessary.	One drive
Staff appraisals	6 years after employment ceases	Management
6 years after employment ceases	12 years after benefit ends	
Health & Safety records	Generally 6 years minimum. Hazardous substances records (COSHH), 40 years.	One drive
Accident Reporting	20 years	Potential claims
Pension investment policies	12 years after benefit ends	Management, Legal
Records of ex-pensioners	6 years after benefit ends	Management, Legal

<u>Insurance</u>	<u>Minimum Retention Period</u>	<u>Reason/ where kept</u>
Certificate for insurance against liability for employees	Indefinitely	Future claims
Insurance policies/schedules	If it is possible for a claim to be made under it	Management and legal proceedings
Insurance company names and policy numbers	Indefinite	Management
Insurance Claim Records	7 years after closure (allowing for claimant to reach age of 25)	Legal, Management