

IRBY UPON HUMBER PARISH COUNCIL

DOCUMENT RETENTION POLICY

Date Policy Agreed	4th November 2026
Date of Next Review	November 2028
Signature (Chair)	Mick Moody
Signature (Clerk)	Jane Thomson

Document Retention Policy

1 Purpose

1.1 The purpose of this policy is to ensure that records created, received and maintained by Irby Upon Humber Parish Council (the Parish Council) are retained for the minimum period of time in accordance with legal and regulatory procedures.

2 Scope

2.1 This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions.

2.2 Records are defined as all those documents which facilitate the business carried out by the Parish Council and which 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 the Parish Council's records may be selected for permanent preservation as part of the Councils archives and for historical research.

3 Policy statement

3.1 The 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 organisation. This document provides the policy framework through which this effective management can be achieved and audited.

4 Responsibilities & review

4.1 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.

4.2 The person responsible for records management will give guidance for good records management and practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and timely.



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4.3 Individual employees and all other role holders must ensure that records for which they are responsible are accurate and are maintained and disposed of in accordance with the Parish Council's Data Protection Policy.

4.4 The Finance & Policy committee are responsible for reviewing this policy. This policy will be reviewed on a biennial basis or in response to changes in the law.

5 Related legislation, policies and guidance

5.1 This policy is not a substitute for legislation, regulations and codes of practice but defines how the Council will apply the relevant legislation. Related legislation, policies and guidance is listed below:

- General Data Protection Regulations (GDPR) 2018

Irby Upon Humber Parish Council internal documents:

- Subject Access Request Procedure
- Privacy notices
- Document Retention Policy

6 Retention schedule

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

Document	**Minimum Retention Period**	**Reason**
Administrative		
Signed minutes of council meetings	Indefinite	Archive
Notes, draft minutes and recordings	Until final minutes have been approved and signed.	Management
Agendas	Until there is no longer an administrative requirement.	Management
Reports and other documents circulated with agendas	Until there is no longer an administrative requirement	Management
Village or parish appraisals, plans and projects and supporting papers	Until there is no longer an administrative requirement.	Management
Planning applications and related papers for major controversial developments	Until there is no longer an administrative requirement.	Management



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Lease agreements	12 years	Limitation Act 1980
Contracts	6 years	Limitation Act 1980
Maps, plans and surveys of property owned by the council	Indefinite	Audit
Correspondence – postal or electronic communications including emails, text messages & telephone messages.	At end of useful life	Management
Information requests	6 years and until there is no longer an administrative need.	Management
Complaints	6 years and until there is no longer an administrative need	Management
Register of electors	Retained until replaced by updated register	Management
Emails	1 year	Storage
Employment		
Staff employment contracts	6 years after ceasing employment	Management
Staff references	6 years after ceasing employment	Management
Recruitment information Unsuccessful Successful	 12 months following appointment of successful candidate 6 years after ceasing employment	 Equalities Act 2010
Disciplinary files	6 years after ceasing employment	Management
Staff appraisals	6 years after ceasing employment	Management
Annual leave and time sheets	2 years after last completed year.	Audit / Management
Councillors		
Declarations of acceptance of office	Term of office (4 years unless office vacated sooner)	Management



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Register of Interests	Current register for duration of term of office. Copies of outdated registers of interest to be destroyed.	Management
Consent forms	5 years	Management
Security compliance checklist	Term of office (4 years unless office vacated sooner)	Audit / Management
Councillor contact details	Term of office	Management
Members allowance register	6 years	Limitations Act 1980
Financial		
Annual audited accounts and AGAR documents	6 years *Minimum of 5 years; recommended 6 in line with other financial information.*	Accounts and Audit Regulations 2015
Paid invoices	6 years	VAT Act 1994
Receipt and payment accounts (Sales and Purchase ledger)	6 years	VAT Act 1994
Bank statements and reconciliations including deposit and saving accounts	6 years	Audit / Management
Cheque book stubs	6 years	Limitation Act 1980
Receipt books	6 years	VAT Act 1994
VAT records and claims	6 years	VAT Act 1994
Payroll and pension contribution records	12 years *(minimum statutory retention of 6 years; recommended retention of 12 years)*	Limitation Act 1980
Tenders and quotes documentation Successful Unsuccessful	 12 years 2 years	Audit / Management
Purchase orders	6 years	Audit / Management



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Insurance, risk assessment and policies		
Insurance policies	6 years after policy end	Management
Employers' liability insurance	40 years after expiry date	Management
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
Accident books/reports	3 years or if a child/young adult, until that person reaches the age of 21	RIDDOR (SI.1995/3163)
Policies	While active and 3 years after the date of expiry.	Management
Risk assessments	While active and 3 years after the date of expiry	Management
Asset register	Indefinite	Audit / management