

## Records Retention Policy

### 1. Introduction

1.1. Springthorpe Parish Meeting 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 association. This document provides the policy framework through which this effective management can be achieved and audited.

1.2 This Policy describes the Scope, Responsibilities and the Records Retention Schedule.

### 2. Scope

2.1. This policy applies to all records created, received or maintained by Springthorpe Parish Meeting in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Springthorpe Parish Meeting and which are thereafter retained (as defined) 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 Springthorpe Parish Meeting records may be selected for permanent preservation as part of the Parish Meeting's archives and for historical research.

### 3. Responsibilities

3.1. Springthorpe Parish Meeting 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 Vice Chair. The person responsible for records management will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner. Parish Representatives must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Springthorpe Parish Meeting's records management guidelines.

## Retention Schedule

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

<b>Document</b>	<b>Minimum Retention Period</b>	<b>Reason</b>
<b>Minutes</b>		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
<b>Parish Representatives</b>		
Parish Representatives' Acceptance of Office Forms	6 years after ceasing role	Management

<b>Finance</b>		
Receipt and payment accounts	6 years	VAT
Bank statements	6 years	Audit
Cheque book stubs	6 years	Audit
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980
Petty cash accounts	6 years	Audit
<b>Insurance</b>		
Insurance policies	6 years after policy end	Management
Certificates for Insurance against liability for employees	6 years after policy end	Management
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
<b>Health and Safety</b>		
Accident books	3 years from date of last entry	Statutory
Risk assessment	3 years	Management
<b>General Management</b>		
Parish Representatives' contact details	Duration of membership	Management
Contracts	6 years	Limitation Act 1980
Email messages	At end of useful life	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management