



RETENTION GUIDELINES FOR EASTFIELD TOWN COUNCIL RECORDS

The Town Council recognises 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 Town Council.

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

Scope

Responsibilities

Retention Schedule

Scope of the policy

This policy applies to all records created, received or maintained by the Town Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Town Council and which are 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 Town Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Responsibilities

The Town 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 the implementation of this policy is the Clerk to the Town Council, and she is required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

Retention Schedule

Under the Freedom of Information Act 2000, the Town Council is required to maintain a retention schedule listing the record series which it creates during its business. 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 Clerk is expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when creating new record keeping systems. This retention schedule refers to record series regardless of the media in which they are stored.

Retention of Documents

Document	Minimum Retention	Reason	Action
Minute Books	Indefinite		Archive
Annual Audited Accounts	Indefinite		Archive
Annual Return	Indefinite		Archive
Bank statements	6 years	Audit	Destroy
Cheque book stubs	Last completed audit	Management	Destroy
Paying in books	Last completed audit	Management	Destroy
Quotations	6 years	Audit	Destroy
Paid invoices	6 years	Audit/VAT	Destroy
VAT records	6 years	VAT	Destroy



Salary records	6 years	Audit	Destroy
Tax & NI records	12 years	Audit	Destroy
Insurance policies	Whilst valid	Audit	Destroy
Cert of Employers Liability	40 years	Audit/legal	Destroy
Cert of public liability	40 years	Audit/legal	Destroy
Assets register	Indefinite	Audit	Preserve
Deeds, leases	Indefinite		Archive
Register of Electors	Once updated	Management	Destroy
Cllrs Declaration of Office	4 years	Management	Destroy
Risk Assessments	Once superseded	Management	Destroy
Members interests	Term of office	Management	Destroy
General Information	12 months	Management	Destroy

Planning Applications

All planning applications and relevant decision notices are available at North Yorkshire Council. There is no requirement to retain duplicates locally. All Town Council recommendations in connection with these applications are recorded in the Council minutes and are retained indefinitely. Correspondence received in connection with applications will be retained as stated below.

Complaints	1 year	Management	Destroy
General information	3 months	Management	Destroy
Routine correspondence & e-mails	6 months	Management	Destroy

Disposal procedures: all documents that are no longer required for administrative reasons should be shredded and disposed of.

Reviewed at meeting held on 11TH November 2025

Signed Cllr T. White-----

Chair