

# **Sellack Parish Council**

## **Retention Schedule**

Adopted: 8 March 2022

Reviewed: March 2024 (no changes)

Reviewed: July 2026 (no changes)

Next Review Date: July 2028

Taken from the Herefordshire Archive Services Best Practice Guidelines for Parish  
Councils

The following information provides an explanation for each of the three action terms used within the schedule.

### **Records identified for permanent preservation**

Records in this category have been identified by Herefordshire Archive Service for permanent retention. These should be deposited with the Archive Service once there is no longer an administrative need for them to be kept locally.

Typically the only financial records recommended for deposit are the payment and receipt books or the annual audited accounts if the former has not survived. These are often filed with receipts and payments that are not necessary for preservation and should be weeded prior to their transfer to the Archive Service.

### **Records to be reviewed by Herefordshire Archive Service**

Records in this category should be transferred to the Archive Service after the minimum retention period or once they become inactive. An archivist will then review the collection and select documents to preserve. Those records not selected may be safely destroyed by the parish or town clerk, or retained locally.

### **Records to be destroyed by the parish or town clerk**

A large number of parish and town council records can be destroyed once they become inactive or the minimum retention period expires. Financial records account for the majority of this category. Typically these must be kept for a minimum of 6 years after the last entry (Limitation Act 1980, VAT Act 1994 etc.), but may be retained for longer depending on local circumstances. Records not given a minimum retention period can be destroyed once there is no longer an administrative requirement for their custody. If you are unsure whether a document or series of records should be destroyed then please contact the Archive Service for further guidance.

To protect confidential information, all records assigned for disposal should be securely destroyed. Paper records containing confidential information should be shredded or pulped, and not simply thrown out with other classes of records. Electronic or machine-readable records will require a two-step process for assured confidential destruction: deletion of the contents of digital files, and the use of commercially available software applications to remove all residual data from the storage device. These processes may be outsourced to credible commercial companies who specialise in confidential destruction of records.

| Records                                             | Retention period                                                                                                                 | Action   | Reason          |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|----------|-----------------|
| <b>Administrative</b>                               |                                                                                                                                  |          |                 |
| Signed council and committee minutes                | Transfer to HRO after 6 years or once they become inactive                                                                       | Preserve | Common practice |
| Draft minutes                                       | Until the date of confirmation of the minutes                                                                                    | Destroy  | Operational     |
| Agendas                                             | Until there is no longer an administrative requirement                                                                           | Destroy  | Operational     |
| Reports and other documents circulated with agendas | Until there is no longer an administrative requirement. Destroy these reports if copies are already included with signed minutes | Review   | Common practice |

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| Councillors' declarations of office                                           | 4 years or until they vacate office                                                                         | Destroy                         | Operational                 |
| Register of electors                                                          | Until there is no longer an administrative requirement                                                      | Destroy                         | Copies already in existence |
| Grouping orders                                                               | Until there is no longer an administrative requirement                                                      | Destroy                         | Operational                 |
| Byelaws and orders                                                            | Preserve one of each copy and transfer to HRO once they become inactive                                     | Preserve                        | Common practice             |
| Policy documents                                                              | Until there is no longer an administrative requirement                                                      | Review                          | Operational                 |
| Title deeds more than 100 years old                                           | Transfer to HRO once they become inactive. HRO will not accept deeds still needed to prove title            | Preserve                        | Common practice             |
| Title deeds less than 100 years old                                           | Transfer to HRO for review once they become inactive. HRO will not accept deeds still needed to prove title | Review                          | Common practice             |
| Property registers and terriers                                               | Transfer to HRO once they become inactive                                                                   | Preserve                        | Common practice             |
| Maps, plans, and surveys of property owned by the council or meeting          | Transfer to HRO once they become inactive                                                                   | Preserve                        | Common practice             |
| Correspondence and papers on important local issues or activities             | Until there is no longer an administrative requirement                                                      | Review                          | Operational                 |
| Village/parish appraisals, plans, millennium projects and supporting papers   | Until there is no longer an administrative requirement                                                      | Review                          | Operational                 |
| Planning applications and related papers for major controversial developments | Until there is no longer an administrative requirement                                                      | Review with the view to destroy | Operational                 |
| Planning applications for minor works where permission is refused             | 6 years                                                                                                     | Destroy                         | Limitation Act 1980         |
| Leases, agreements, contracts and wayleaves                                   | Until there is no longer an administrative requirement                                                      | Review                          | Operational                 |
| Quotations and tenders (successful)                                           | 12 years                                                                                                    | Destroy                         | Limitation Act 1980         |

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|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Quotations and tenders (unsuccessful)          | 2 years                                                                                                               | Destroy                                                                   | Operational                                                                                                                                                                                                    |
| Routine correspondence and papers              | Until there is no longer an administrative requirement                                                                | Review with the view to destroy                                           | Operational                                                                                                                                                                                                    |
| Scale of fees and charges                      | Until superseded by new charges                                                                                       | Destroy                                                                   | Operational                                                                                                                                                                                                    |
| Employers' liability insurance policies        | 40 years after expiry date                                                                                            | Destroy                                                                   | Employers' Liability Act 1969 Employers' Liability Regulations 1998                                                                                                                                            |
| Risk assessments                               | Once superseded by a new risk assessment or once inactive                                                             | Destroy                                                                   | Operational                                                                                                                                                                                                    |
| Personnel files                                | 6 Years plus 6 Years for summary for non-management staff; 12 Years after termination of service for management staff | Destroy                                                                   | Risk of investigation regarding any future litigation                                                                                                                                                          |
| Personnel files – annual leave                 | 2 years                                                                                                               | Destroy                                                                   | Operational                                                                                                                                                                                                    |
| Recruitment data<br>Successful<br>Unsuccessful | 9 Months after recruitment finalised 1 year after recruitment finalised plus current year                             | Destroy                                                                   | Sex Discrimination Acts 1975 and 1986, Race Relations Act 1976, Disability Discrimination Act 1995, Employment Equality (Sexual Orientation) Regulations, Employment Equality (Religion or Belief) Regulations |
| <b>Financial</b>                               |                                                                                                                       |                                                                           |                                                                                                                                                                                                                |
| Receipt and payment books                      | Transfer to HRO once they become inactive                                                                             | Preserve                                                                  | Herefordshire Council financial regulations                                                                                                                                                                    |
| Rate books                                     | Transfer to HRO                                                                                                       | Preserve                                                                  | Common practice                                                                                                                                                                                                |
| Annual audited accounts                        | 6 years.                                                                                                              | Destroy, but preserve if the receipt and payment books have not survived. | Herefordshire Council financial regulations                                                                                                                                                                    |
| Accounts and statements                        | 6 years                                                                                                               | Destroy                                                                   | Herefordshire Council financial regulations                                                                                                                                                                    |
| Vouchers before 1950                           | 6 years                                                                                                               | Destroy                                                                   | Herefordshire Council financial regulations                                                                                                                                                                    |

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| Cash and petty cash books and rent books                                                                                                                         | 6 years                                                | Destroy                         | Herefordshire Council financial regulations |
| Receipt books of all kinds                                                                                                                                       | 6 years                                                | Destroy                         | Herefordshire Council financial regulations |
| Postage and telephone books                                                                                                                                      | 6 years                                                | Destroy                         | Herefordshire Council financial regulations |
| Bank statements including deposit/saving accounts                                                                                                                | 6 years                                                | Destroy                         | Herefordshire Council financial regulations |
| Bank paying-in books                                                                                                                                             | Last completed Audit year                              | Destroy                         | Herefordshire Council financial regulations |
| Cheque book stubs                                                                                                                                                | Last completed Audit year                              | Destroy                         | Herefordshire Council financial regulations |
| Paid invoices                                                                                                                                                    | 6 years                                                | Destroy                         | Herefordshire Council financial regulations |
| Paid cheques                                                                                                                                                     | 6 years                                                | Destroy                         | Herefordshire Council financial regulations |
| VAT records                                                                                                                                                      | 6 years                                                | Destroy                         | VAT Act 1994                                |
| VAT claims                                                                                                                                                       | 6 years                                                | Destroy                         | VAT Act 1994                                |
| Time sheets                                                                                                                                                      | Last completed Audit year                              | Destroy                         | Herefordshire Council financial regulations |
| Wage books                                                                                                                                                       | 12 years                                               | Destroy                         | Statute of Limitation                       |
| Members' allowances register                                                                                                                                     | 6 years                                                | Destroy                         | Statute of Limitation                       |
| Records relating to parish halls, centres and recreation grounds, applications to hire, letting diaries, copies of bills to hirers and records of tickets issued | 6 years                                                | Review with the view to destroy | Herefordshire Council financial regulations |
| <b>Miscellaneous</b>                                                                                                                                             |                                                        |                                 |                                             |
| Maps created under the provision of the Rights of Way Act 1932                                                                                                   | Transfer to HRO once they become inactive              | Preserve                        | Common practice                             |
| Papers concerning Rights of Way                                                                                                                                  | Until there is no longer an administrative requirement | Destroy                         | Operational                                 |

|                                    |                                                        |        |             |
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| Community magazines or newsletters | Until there is no longer an administrative requirement | Review | Operational |
| Charity papers                     | Until there is no longer an administrative requirement | Review | Operational |
| Press cuttings book                | Until there is no longer an administrative requirement | Review | Operational |

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| Any records predating the establishment of Parish Councils (1894), e.g. poor law, surveyors of the highway, tithe maps and apportionments, enclosure awards etc. | Transfer to HRO immediately                            | Preserve | Common practice |
| Records of other bodies such as burial boards, charities, fire brigades, Home Guard unit, local society or ad hoc committee                                      | Transfer to HRO once they become inactive              | Preserve | Common practice |
| Reports, guides, handbooks etc received from other organisations                                                                                                 | Until there is no longer an administrative requirement | Review   | Operational     |