



Heckington Parish Council Records Retention Policy

Heckington 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 association. This document provides the policy framework through which this effective management can be achieved and audited.

It covers:

- Scope
- Responsibilities
- Retention Schedule

Scope

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

Responsibilities

Heckington 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. 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 timely. Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Heckington Parish Council's records management guidelines.

Retention Schedule

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

Document	Minimum Retention Period	Reason
Minutes		
Minutes of Council meetings	Indefinite	Archive
Minutes of committee meetings	Indefinite	Archive
Annual report to the parish meeting	Indefinite	Archive
Agendas	5 years	Management
Meeting Recordings	Until after the minutes of that meeting have been approved	Management
Local/historical information	Indefinite – to be securely kept for benefit of parish – Local Government (Records) Act 1962	Councils may acquire/ accept gifts of records
Employment		

Staff employment contracts	6 years after ceasing employment	Management
Staff payroll information	6 years	Management
Staff references	6 years after ceasing employment	Management
Application forms (interviewed – unsuccessful)	6 months	Management
Application forms (interviewed – successful)	6 years after ceasing employment	Management
Disciplinary files	6 years after ceasing employment	Management
Staff appraisals	6 years after ceasing employment	Management
Finance	For the avoidance of doubt – 6 years means 6 completed year and current financial year.	
Scales of fees and charges	6 years	Management
AGAR	6 years	Audit
Budgets	6 years	Audit
Receipt books	6 years	Audit
Bank Reconciliations	6 years	Audit
Precept Requests	6 years	Audit
Borrowing and Approval Letters	6 years	Audit
Bank statements	6 years	Audit
Grants	6 years	Audit
Asset Register	6 years	Audit
Policies	6 years. Policy may be deleted upon the creation of a new version.	Audit
Cheque book stubs/Paying in stubs	6 years	Audit
Quotations & tenders & contracts	6 years	Limitation Act 1980 (as amended)
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980
Payroll records	6 years	HMRC
Rent	6 years	Limitation Act 1980
Timesheets	6 years	Audit requirement, personal injury best practice is 3 years
Investments	Indefinite	Audit, Management
Title deeds, leases, agreements, contracts, trust deeds	Indefinite	Audit, Management
VAT records	6 yrs	VAT
Debit arising under a simple contract	6 years	Limitation Act 1980
Debt arising under a lease	12 years	Limitation Act 1980
Insurance		
Insurance policies	Whilst valid or 3 years after policy end	Management
Certificates for Insurance against liability for employees	40 years from date on which insurance commenced or renewed	The Employers' Liability (compulsory Insurance) Regs 1998
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
Health and Safety		
Accident books/incident reports	20 years – for potential claims	Statutory
Equipment inspection reports	6 years	
Personal injury	3 years	
Risk assessment	3 years	Management

General Management		
To ensure records are easily accessible: <ul style="list-style-type: none"> Keep a list of files stored in cabinets Electronic files will be saved using relevant file names 	Electronic files will be backed up daily/monthly to an external hard drive (x 2)	Management
General correspondence	1 year or at the end of useful life	Management
Negligence	6 years	Limitation Act 1980
Defamation	1 year	Limitation Act 1980
Contract	6 years	Limitation Act 1980
Councillors contact details including DOI and DPI forms	Duration of membership	Management
Lease agreements	12 years	Limitation Act 1980
Teams message boards	6 months	Management
Email messages	1 year or at the end of useful life	Management
Consent forms	5 years	Management
GDPR Security Compliance form	Duration of membership	Management
For Halls, Centres and Recreation Grounds		
Applications to hire	6 years	VAT
Lettings diaries	6 years – electronic files linked to accounts	VAT
Copies of invoices to hirers	6 years	VAT
Terms and conditions	6 years	
Allotments		
Register and plans	Indefinite	Audit, Management
Minutes & legal papers	Indefinite	Audit, Management
Cemeteries		
Register of Burials	Indefinite	Archives, Local Authorities Cemeteries Order 1977 (S.I. 204)
Register of purchased graves		
Register/plan of grave spaces		
Register of memorials		
Register of fees collected		
Applications for interment		
Applications for right to erect memorials	Indefinite	Archives, Local Authorities Cemeteries Order 1977 (S.I. 204)
Disposal certificates		
Copy certifications of grant of exclusive right of burial		
General Correspondence	6 Years	Management
Planning		
Local Development plans, local plans	Retain as long as in force	Reference
Neighbourhood plans	Indefinite – final adopted plans	Historical purposes

Version control and amendment history

Date approved	Version Number	Revision / amendments made	Review date
23 February 2026	V1.0	New Policy	May 2026
18 May 2026	V1.0	Re-adopted. No amendments	May 2027