

## Horsted Keynes Parish Council – Document Retention & Disposal Schedule

Record Type / Category	Retention Period	Retention justification (if not consistent with legislation, regulation, or guidance)	Record Medium	Location	Secure disposable method (including proof)
Minutes	Indefinite	Archive	Signed paper copy	Minute books (Secure storage)	Confidential waste
	5 years		Digital copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Provider	Permanent removal from website CMS
Schedule of payments, receipts, & bank reconciliation	Indefinite	Archive	Signed paper copy	Minute books (Secure storage)	Confidential waste
	7 years		Digital copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Provider	Permanent removal from website CMS
Agendas	1 week		Paper copy	Notice board	Confidential waste
	5 years		Digital copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Provider	Permanent removal from website CMS
Meeting support documents	5 years		Digital copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Provider	Permanent removal from website CMS
Information from external sources (e.g., NALC, WSALC, MSALC, WSCC, MSDC, etc.)	Retained for as long as it is relevant	Public interest	Digital copy	Clerk's computer	Deletion of computer record
			Website	Service Provider	Permanent removal from website CMS
All contracts or agreements with customers, suppliers, agents, etc.	10 years after expiry		Digital copy	Clerk's computer	Deletion of computer record
Licence agreements	10 years after expiry		Digital copy	Clerk's computer	Deletion of computer record
	Retained for as long as it is relevant		Website	Service Supplier	Permanent removal from website CMS
Title Deeds	Until sold or transferred		Website	Land Registry	Update registration
			Website	Service Supplier	Permanent removal from website CMS
Lease	12 years after termination & any terminal queries (e.g., dilapidations) have been settled 6 years after completion		Digital copy	Clerk's computer	Deletion of computer record
			Website	Service Provider	Permanent removal from website CMS

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Bank statements including Community & Business Base Rate Tracker accounts	7 years, if the account is still open		Website	Barclays Bank	Barclays Bank procedure
Invoices	6 years		Digital copy	Clerk's computer	Deletion of computer record
VAT Records	6 years		Digital copy	Clerk's computer	Deletion of computer record
Receipts & Payments	6 years		Digital copy	Clerk's computer	Deletion of computer record
Quotations & Tenders	6 years		Digital copy	Clerk's computer	Deletion of computer record
Employee Timesheets	Last completed audit plus 3 years	Internal & External Audit	Digital copy	Clerk's computer	Deletion of computer record
Employee Payroll Reports	Last completed audit plus 6 years	Internal & External Audit	Digital copy	Clerk's computer	Deletion of computer record
Employee Policies	Indefinite – updated as appropriate		Digital copy	Clerk's computer	Deletion of computer record
			Website	Service Supplier	Permanent removal from website CMS
Insurance Schedules	Until renewed		Paper copy	Secure storage	Confidential waste
Certificate of Public Liability	20 years		Paper copy	Secure storage	Confidential waste
	6 years		Scanned copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Supplier	Permanent removal from website CMS
Employers' / Trustees Indemnity	20 years		Paper copy	Secure storage	Confidential waste
Accident/incident reports	20 years	Potential claims	Paper copy	Secure storage	Confidential waste
	5 years		Digital copy	Clerk's computer	Deletion of computer record
Recreation equipment inspection reports (RoSPA)	15 years		Digital copy	Clerk's computer	Deletion of computer record
	5 years		Website	Service Provider	Permanent removal from website CMS
Councillor's Register of Interest	4 years after election, which may be uncontested. If co-opted, retention up to next election.		Digital copy	Clerk's computer	Deletion of computer record
			Website	Service Provider	Permanent removal from website CMS
Councillor's Acceptance of Office	4 years after election, which may be uncontested. If co-opted, retention up to next election		Digital copy	Clerk's computer	Deletion of computer record
			Website	Service Provider	Permanent removal from website CMS
Councillor's Willingness to Act as a Trustee	5 years; renewed annually		Digital copy	Clerk's computer	Deletion of computer record
			Website	Service Provider	Permanent removal from website CMS

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Parish Electoral Register	3 years		Paper copy	Secure storage	Confidential waste
			Digital copy	Clerk's computer	Deletion of computer record
Neighbourhood Plans	Indefinite – 'made' plans	Historical purposes	Digital copy	Clerk's computer	Not applicable
			Website	Service Provider	Not applicable
<b>Recreation Ground Charity (305259)</b>					
Minutes	6 years	Charities Act 2011	Digital copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Provider	Permanent removal from website CMS
Agendas	6 years		Digital copy	Clerk's computer	Deletion of computer record
	2 years		Website	Service Provider	Permanent removal from website CMS
Financial records	Minimum of 6 years from the end of the financial year in which they were made.	Charities Act 2011	Digital copy	Clerk's computer	Deletion of computer record
<b>Lewes Road Allotments</b>					
Register of Allotments	Indefinite	Audit	Digital copy	Clerk's computer	Deletion of computer record