

Hullbridge Parish Council - Records Retention Policy (9th October 2023 Agreed Annually)

The Minimum Retention Period is based on guidance from the Essex Association of Local Councils and Hullbridge Parish Council Staff.

Type of Record	Format - Hard	Format - digital	Minimum Retention Period	Reason from EALC	Rec. by PC Staff
Agenda – Council Meetings	√	√	2 years		√
Agenda – Non Council Meetings		√	3 years		√
Agenda – Non Council Meetings	√		1 year		√
Allotment Agreement	√		Indefinite		√
Allotment – Register of Plans	√		Indefinite	Audit, Management	
Asset Register		√	Indefinite		√
Attendance Register	√		4 years until Quality Status heard		√
Bank Statements, including Deposit and Savings Accounts	√		6 years	Audit	√
Bank Paying in Books	√		6 years	Audit	√
Cheque Book Stubs	√		6 years	Audit	√
Cheques Paid	√		6 years	Statute of Limitation	√
Customer Surveys		√	3 years – results only, do not retain the supporting documentation once the survey has been compiled		√
Customer Surveys	√		1 year – results only, do not retain the supporting documentation once the survey has been compiled		√
Hullbridge – Welcome Leaflet, back issues	√		20 copies plus a master copy		√
Gifts Received Register	√	√	Indefinite		
Grant Application by HPC	√		6 years. Keep with audited financial documents		√

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Grant Application to HPC	√		6 years. Keep with audited financial documents		√
Investments	√		Indefinite	Audit, Management	
Invoices Paid	√		6 years	VAT	
Insurance Policies - HPC	√		6 years	Management	
Insurance Policies – Tenants, Football Clubs	√		While valid		√
Letters – general correspondence		√	3 years		√
Letters – general correspondence	√		1 year		√
Members Allowance Register	√		6 years	Tax, Statute of Limitations	
Members Attendance Register	√		4 years until Quality Status heard		√
Members Declaration of Acceptance of Office	√		Indefinite		√
Members Declarations of Interest Register		√	Indefinite		
Minutes & Minutes Book – Council Meetings	√	√	Indefinite. Hard copies archived to Records Office	Archive	√
Minutes – Non Council Meetings		√	3 years		√
Minutes – Non Council Meetings	√		1 year		√
Minutes/notes – handwritten. This includes any notes taken by Members.	√		Until the minutes have been agreed		√
Planning Applications		√	At least 5 years, depending on available computer storage		√
Planning Applications	√		Where received in this form, 3 years		√
Petty Cash	√		6 years	Tax, VAT, Statute of Limitations	
Postage	√		6 years	Tax, VAT, Statute of Limitations	
Quotations and Tenders – successful	√		12 years/indefinite.	Statute of Limitations	
Quotations as Tenders – unsuccessful	√		Life of Tender		√

Type of Record	Format - Hard	Format - digital	Minimum Retention Period	Reason from EALC	Rec. by PC Staff
Quotations - unsuccessful	√		1 year		√
Receipt and Payments Book	√		Indefinite	Archive	
Receipt Books of All Kinds	√		6 years	VAT	
Risk Assessments Play Area	√	√	25 years	Public Liability	√
Scales of Fees and Charges		√	5 years	Management	
Standing Orders	√				
Timesheets	√		2 years	Audit and Working Time Regulations	
Title Deeds, Leases, Agreements, Contracts	√		Indefinite	Audit, Management	
VAT Records	√		6 years	VAT	
Wages Books	√		12 years	Superannuation	