



# **Boldre Parish Council**

## **Retention of Documents Policy**

Version: 1.4

Proposed for: 10<sup>th</sup> August 2020  
Adopted: 10<sup>th</sup> August 2020

For queries on this document, please contact the Clerk to the Parish.

**Address:** c/o Pilley Community Shop, PILLEY, Lymington, SO41 5QP

**Phone:** 07751 497597

**Email:** [clerk.boldre@parish.hants.gov.uk](mailto:clerk.boldre@parish.hants.gov.uk)



DOCUMENT	MINIMUM RETENTION PERIOD	REASON
<b>General &amp; Finance</b>		
Parish Minutes & word processed (WP) meeting notes of committees	Indefinite	Archive
Hand written notes for transcription to typed documents	May be destroyed as soon as WP document is approved	Document kept as WP version only
Emails	3 months. Complaints/reports from highways, reports and letters from enforcement and any additional information to specific planning or highway issues are kept in relevant soft copy file	Management. Archive
Minutes & agendas New Forest National Park Authority (NFNPA) & New Forest District Council (NFDC)	Not kept. Access is available to NFNPA and NFDC information on-line	Reference
Scales of fees and charges	6 years	Management
Receipt & payment accounts	Indefinite	Archive
Receipt books of all kinds	6 years	VAT
Bank statements including deposit/savings accounts	Last completed audit year	Audit
Bank paying in books	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Quotations & tenders	6 years	Limitation Act 1980 (as amended)
Paid invoices	6 years	VAT
Paid Cheques	6 years	Limitation Act 1980 (as amended)
VAT Records	6 years generally but 20 years for VAT on rents	VAT
Petty cash, postage and telephone books	None kept	Tax, VAT, Limitation Act 1980

		(as amended)
Timesheets & expense claims	Last completed audit year 12 years	Audit (requirement) Personal injury (best practice), Superannuation
Insurance policies	While valid but previous 5 years for comparisons	Management
*Certificates for Insurance against liability for employees*	40 years from date on which insurance commenced or was renewed	The Employers' Liability (Compulsory Insurance) Regulations 1998 (SI. 2753), Management
Investments	Indefinite	Audit, Management
Title deeds, leases, agreements, contracts	Indefinite	Audit, Management. Deeds kept at bank
Members allowances & expenses records	6 years	Tax, Limitation Act 1980 (as amended)
Policies & procedures	Indefinite. Review annually. Superseded to be marked as such.	Management, Reference.
Safety inspections and maintenance	12 years	Statute of Limitations
<b>Planning</b>		
Planning applications: <ul style="list-style-type: none"> <li>• granted &amp; non-contentious</li> <li>• refused &amp; non-contentious</li> <li>• refused or granted - contentious and/or ongoing</li> </ul>	BPC decisions on planning applications are recorded in the meeting minutes at which the decision was taken. This includes planning recommendations to the relevant planning authority and any other planning related decisions. Minutes are retained in line with the policy details stated in this document BPC correspondence/documents sent or received on planning decisions are stored electronically on OneDrive and are retained for 7 years. Full planning decisions are available via the relevant planning authority.	Management
Associated planning documents	In accordance with individual case	Management
Local plans etc	As long as valid	Management



<b>Information from other bodies e.g. National association of Local Councils (NALC)</b>	As long as useful & relevant	Management
<b>Magazines &amp; journals</b>	Not kept	Reference
<b>Correspondence and general files</b>	If associated with other areas above – same retention time. Otherwise review annually. Documents of historical importance should be retained or given to local/county archivist	Management. Archive
<b>For recreation area and pavilion</b>		
Application to hire	6 years	Audit & VAT
Lettings records		
Copies of payments to hirers		
<b>*For allotments – all documents*</b>	Indefinite	Audit, management
<b>*For burial grounds*</b>		
Register of fees collected	Indefinite	Archives, Cemeteries Orders, cremations Regulations
Register of burials		
Register of purchased graves		
Register/plan of grave spaces		
Register of memorials		
Applications for interment		
Memorial applications		



Disposal certificates		
Copy certificates of grant of exclusive right of burial		

\* Not relevant to Boldre parish council at present date – for reference only



## Change History

Version	Date	Author	Change Summary
1.0	09/02/09	Clerk	Initial Version
1.1	26/07/15	Oliver Moore	Updated to new template, added acronym definitions.
1.2	29/8/16	Peter Lock	Council address
1.3	25/06/20	Peter Lock	Wording review
1.4	28/06/20	Oliver Moore	Updated in line with NALC LTN 40 (Nov' 2016)

## Review Log

Version	Date	Reviewer	Comments
1.0	14/07/15	James Puttick	We should define acronyms where used.
1.3	25/05/20	Oliver Moore	Requested clarification on legal position regarding planning changes. Rejected proposed changes to allotments/burials.
1.4	10/8/20	BPC	Adopted at BPC meeting