Records Retention Policy

Little Longstone Parish Meeting

Version 1.0 - Adopted at the assembly held on 26th August 2026.
Replaces the retention policy of November 2018.

> ***How to use this policy:*** *This policy explains how Little Longstone Parish Meeting manages its records throughout their life, including how long different records are retained, when records are reviewed for permanent preservation, and when they may be securely destroyed. It should be read alongside the Parish Meeting's Privacy Policy, Data Protection Policy and Freedom of Information Publication Scheme.*

1. Purpose and scope

1.1 Effective records management supports good governance, accountability, continuity and compliance with legal obligations. This policy applies to all records created, received or maintained by the Parish Meeting in the course of its functions, whether held on paper or electronically, including correspondence and email.

1.2 Records will not be destroyed solely because a minimum retention period has expired. Where a record may have continuing legal, evidential, governance, administrative or historical value, it will be reviewed and may be selected for permanent preservation.

1.3 The value of a record depends principally on its content and context, not its format. Correspondence, emails, photographs, plans, invoices or other apparently routine records may therefore be retained where they provide significant evidence of the Parish Meeting's decisions, activities, rights, responsibilities or history.

1.4 The Parish Meeting recognises that, because many matters arise only occasionally, older correspondence may have continuing administrative and evidential value. A searchable history of correspondence can provide important organisational memory and assist future office-holders in identifying previous contacts, decisions and actions.

1.5 The Parish Meeting will take a proportionate approach to managing email and other high-volume correspondence. It is not necessary routinely to review and delete individual messages solely because of their age where doing so would impose a disproportionate administrative burden or create a material risk of destroying records of continuing value. Clearly transitory, duplicate or unnecessary material may be deleted when convenient.

1.6 Records of enduring value will be preserved permanently. These may include minutes, constitutional records, significant governance records, records concerning land and property, important agreements and legal rights, and selected correspondence or other material documenting matters of lasting significance to the Parish Meeting or community.

1.7 Permanent preservation does not require the Parish Meeting to retain unnecessary personal information. Records selected for long-term preservation will be managed in accordance with data protection law, and unnecessary or duplicated personal information may be removed where appropriate without destroying the evidential or historical value of the record.

1.8 At the end of a specified retention period, a record will normally have one of three outcomes: **Destroy**, where it has no continuing value; **Review**, to decide whether it should be destroyed, retained for a further period or preserved permanently; or **Permanent**, where it has enduring value and is retained permanently or transferred to appropriate archival custody.

1.9 Records selected for permanent preservation should be kept in suitable long-term storage and, where appropriate, may be transferred to an appropriate archive or record office. Permanent records should not depend solely on an individual office-holder's personal files, email account or equipment.

2. Responsibilities

2.1 The Clerk has day-to-day responsibility for the management of the Parish Meeting's records, including their organisation, security, accessibility, retention, review, permanent preservation and secure disposal where appropriate.

2.2 Official Parish Meeting records should, so far as practicable, be held in corporate filing, email or storage arrangements rather than solely in the personal accounts, files or equipment of an individual office-holder. Arrangements should allow appropriate access and continuity if the Clerk or another person responsible for records becomes unavailable.

2.3 Records should be organised, where practicable, by subject or function so that related material can be located together. Important correspondence and other records should be associated with the relevant subject, property, contract, project or governance matter where this assists future retrieval.

2.4 Email and other high-volume correspondence will be managed proportionately. Routine deletion or manual review of individual messages solely because of their age is not required where this would impose a disproportionate administrative burden or create a material risk of destroying records of continuing value. Clearly transitory, duplicate or unnecessary material may be deleted when convenient.

2.5 Records of significant or permanent value should, where practicable, be identified and retained with the relevant subject or permanent records rather than relying solely on their continued availability within an email account.

2.6 Records should be destroyed only where the retention schedule permits this and there is no continuing legal, administrative, evidential or historical reason to retain them. Records containing confidential or personal information must be disposed of securely, including confidential destruction of paper records and appropriate deletion of electronic records.

2.7 A record must not be destroyed while it is relevant to an ongoing or reasonably anticipated legal proceeding, audit, complaint, investigation, information request or other matter for which it may be required, even if its normal retention period has expired.

2.8 Records selected for permanent preservation should be maintained in suitable long-term storage. The Clerk should periodically consider whether older permanent records would be better preserved by transfer to an appropriate archive or record office, while retaining access or copies where reasonably required for Parish Meeting purposes.

3. Retention schedule

3.1 The schedule below sets minimum retention periods or review points. A minimum retention period is not an instruction to destroy a record when that period expires. The principles in sections 1 and 2 must be applied before destruction, including consideration of any continuing administrative, legal, evidential, governance or historical value.

3.2 Where records concerning the same matter fall into different categories, they should normally be managed according to the category which best reflects their subject and continuing value. In particular, correspondence should not be treated as “general correspondence” merely because it was sent by email or letter.

Record	Minimum retention / review point	Action
Governance and meetings		
Minutes of assemblies	Permanent	Retain permanently.
Agendas and significant supporting papers	6 years, then review	Preserve permanently where they provide significant context to decisions or matters of enduring importance; otherwise may be destroyed after review.

Record	Minimum retention / review point	Action
Standing Orders, Financial Regulations, Code of Conduct and other governance policies	Current version while in force; superseded versions review after 6 years	Preserve a representative record of significant former governance arrangements and versions of enduring evidential or historical value. Other superseded copies may be destroyed.
Risk Management Policy and Risk Registers	Current while in force; superseded versions review after 6 years	Preserve versions documenting significant risks, events or changes in governance; otherwise destroy after review.
Registers and formal governance records not covered elsewhere	While current; review superseded records after 6 years	Preserve permanently where they form part of the enduring governance record; otherwise destroy after review.
Finance and audit		
Annual Governance and Accountability Returns, annual accounts and final internal/external audit reports	Permanent	Preserve the final annual accounts, AGAR and final internal/external audit reports permanently as part of the Parish Meeting's financial and governance record.
Cashbooks or equivalent principal accounting records	6 years plus current year, then review	Consider permanent preservation of year-end or principal accounting records; otherwise destroy after review.
Invoices, receipts, payment records, bank statements and cheque records	6 years plus current year, or longer where required	Normally destroy after the retention period unless relevant to a matter of continuing evidential or historical value.
Budgets and budget-monitoring reports	6 years, then review	Preserve significant annual/final records where they provide useful financial history; otherwise destroy after review.
Bank reconciliations and financial verification records	6 years	Normally destroy unless required for an ongoing matter.
Asset Register	Current version permanently; superseded versions review	Preserve versions recording significant acquisition, disposal or changes to LLPM's assets; routine intermediate versions may be destroyed.
Land, property and legal		
Title deeds, conveyances, orders, declarations, plans, byelaws and other primary evidence of ownership, rights or obligations	Permanent	Preserve permanently.
Records concerning the acquisition, ownership, occupation, boundaries, use, management, maintenance or disposal of land and significant assets	Permanent or long-term review as appropriate	Preserve records providing material evidence of LLPM's rights, responsibilities, occupation, management or historical involvement.
Significant correspondence concerning land, property or assets	Permanent where of evidential value	Preserve where it may provide evidence of ownership, occupation, maintenance, rights, responsibilities, agreements or the history of the property.
Legal advice and case files concerning land, title, rights or other matters of enduring significance	Review after the matter concludes; normally permanent where continuing evidential value exists	Do not destroy without considering continuing legal and evidential value and, where appropriate, obtaining legal advice.
Other legal case files	Matter concluded + 6 years, then review	Destroy only where there is no continuing legal, evidential, governance or historical value.

Record	Minimum retention / review point	Action
Contracts, licences and procurement		
Registers of contracts, licences or commercial arrangements	Current permanently; superseded records review	Preserve records necessary to establish the history of significant commercial arrangements.
Executed contracts, leases, licences and agreements	Duration of agreement + 6 years minimum, then review	Preserve permanently where connected with land, significant assets, important rights or arrangements of enduring evidential or historical value.
Tender and procurement records, including successful and unsuccessful submissions	6 years after completion, then review	Routine material may be destroyed; preserve records of significant procurement or commercial arrangements where they provide enduring evidence of the decision or management of an asset.
Significant correspondence relating to contracts, licences or commercial arrangements	Retain with the relevant subject record	Apply the retention outcome appropriate to the underlying arrangement rather than treating it as general correspondence.
Complaints, information rights and data protection		
Complaints register	Permanent	Maintain an enduring record of complaints and outcomes, containing only the personal information necessary for that purpose.
Individual complaint files	6 years after closure, then review	Normally destroy unnecessary case material; preserve material where the complaint has enduring governance, legal or historical significance.
FOIA/EIR request log	6 years, then review	Consider retaining an enduring summary record; routine case details may be destroyed.
FOIA/EIR requests and responses	3 years after completion, then review	Destroy routine cases; preserve significant decisions or disclosures where they provide useful precedent or governance history.
Data-subject rights requests	3 years after completion	Normally destroy unless relevant to an ongoing matter or significant compliance issue.
Personal-data breach register	Permanent	Maintain sufficient record to demonstrate compliance; review supporting case material after 6 years.
Detailed personal-data breach files	6 years after closure, then review	Destroy where no longer necessary unless the incident has continuing legal or governance significance.
Insurance		
Insurance policies, schedules and renewal records	6 years after expiry, then review	Preserve older policies where they may evidence historic cover relevant to long-tail claims; otherwise destroy.
Liability insurance certificates and records of cover	Permanent	Preserve because claims may arise many years later.
Claims and significant insurance correspondence	Claim closed + 6 years minimum, then review	Preserve where there may be continuing liability or evidential value.
Clerk and other office-holder records		
Clerk's contract or terms of appointment and significant engagement records	Engagement ends + 6 years, then review	Normally destroy personal material after the retention period; preserve records necessary to document the history of the office or significant governance matters.
Payroll, remuneration, invoices and related financial records	6 years plus current year, or longer where required	Normally destroy securely after the retention period.

Record	Minimum retention / review point	Action
Records relating to Chair, Vice Chair or other office-holders	While current, then review	Preserve formal appointment, office and significant governance records; destroy unnecessary personal/contact information.
General correspondence and email		
General correspondence and email not forming part of another record category	No fixed automatic deletion period	Retain while it has continuing administrative, evidential, governance or historical value. Routine deletion by age alone is not required. Clearly ephemeral, duplicate or unnecessary material may be deleted when convenient. Significant correspondence should be retained with the relevant subject record where practicable.
Photographs, maps and historical material		
Photographs, maps, plans, surveys and other records documenting LLPM's assets, activities or the parish	Review for enduring value	Preserve permanently where they provide significant evidential, administrative or historical information.

4. Resolution of Adoption and Review

Date of policy: August 2026
Approving body: Little Longstone Parish Meeting
Date of Assembly and Minute Reference: 26th August 2026 – Minute reference 52/26
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