

Whixall Parish Council

RECORD MANAGEMENT POLICY

This Record Management Policy was adopted by the Council at the Meeting on: **14th October 2015**.

Whixall Parish Council has adopted the following policy in order to ensure that there is a standard procedure for maintaining and retaining appropriate documents.

Whixall Parish Council recognises that the efficient management of its documents and records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the Parish Council.

Scope of the Policy

This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions.

Records are defined as all those documents which facilitate the business carried out by the 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. The attached National Association of Local Councils' (NALC) Legal Topic Note (LTN)40 provides further detail about the length of time documents are kept.

The following list identifies specific documentation that is required to be published under the 2014 Transparency Code for Smaller Authorities and as such will also be stored electronically and in hard copy:

- a) All items of expenditure above £100
- b) End of year accounts
- c) Annual governance statement
- d) Internal audit report
- e) List of councillor or member responsibilities
- f) The details of public land and building assets
- g) Minutes, agendas and meeting papers of formal meetings

In addition to the above list, the following will also be stored electronically and in hard copy:

- h) Investment details
- i) Title deeds, leases, agreements and contracts
- j) Register and plans for allotments
- k) Documents relating to burial grounds
- l) Policies
- m) Newsletters

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research. The LTN 40 states that meeting minutes, receipt and payment accounts should be archived. The Clerk will liaise with Shropshire Archives to agree receipt of these and possibly other documents of interest.

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Responsibilities

The Parish Council recognises it has a 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 to the Parish Council.

Retention of Documents

The Parish Council will refer directly to the National Association for Local Councils (NALC) Legal Topic Note (LTN)40- Local Council's Documents and Records, January 2013 (Appendix a) for information relating to the length of time certain documents should be retained.

The Parish Council will review this policy bi-annually to ensure that its compliance with national guidance is up to date.

The attached LTN40 provides information about the retention of planning papers, insurance policies, information from other bodies, magazines and journals, correspondence, documentation relating to staff, data protection and freedom of information considerations and local/ historical information.

The Parish Council will deposit documents required to be retained permanently with Shropshire Archives as necessary.

All documents not required to be retained as per the Retention Schedule will be destroyed once it is clear that they are no longer of use or relevant. For example the following can be destroyed after 6 years:

- Scales of fees and charges
- Receipt books of all kinds
- Quotations and tenders
- Paid invoices
- Paid cheques
- VAT records
- Petty cash, postage and telephone books
- Members allowances register

The destruction of documents

Paper documents will be either shredded or burned.

Electronic records: The hard disk on the Parish Council's computer will be over written in the event that it is no longer used by the Clerk for the role of Clerk.