



Kippax Parish Council

Records Management Policy

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M Eyre

Chair, Councillor Martin Eyre

1 Introduction

1.1. The guidelines set out in this document supports Kippax Parish Council (“the Council”) Data Protection Policy and assists us in compliance with the Freedom of Information Act 2000, the General Data Protection Regulation 2018 (GDPR) and other associated legislation.

1.2. It is important that the Council has in place arrangements for the retention and disposal of documents necessary for the adequate management of services in undertaking its responsibilities. This policy sets out the minimum requirements for the retention of documents and sets out the requirements for the disposal of documents. However, it is important to note that this is a live document and will be updated on a regular basis.

1.3. The Council will ensure that information is not kept for longer than is necessary and will retain the minimum amount of information that it requires to carry out its functions and the provision of services, whilst adhering to any legal or statutory requirements.

2. Aims and Objectives

2.1. It is recognised that up to date, reliable and accurate information is a vital to support the work that the Council does and the services that we provide to our residents. This document will help us to:

- Ensure the retention and availability of the minimum amount of relevant information that is necessary for the Council to operate and provide services to the public.

- Comply with legal and regulatory requirements, including the Freedom of Information Act 2000, the Environmental Information Regulations 2004 and the GDPR.
- Save employees' time and effort when retrieving information by reducing the amount of information that may be held unnecessarily.
- Ensure archival records that are of historical value are appropriately retained for the benefit of future generations.

3. Scope

3.1. For the purpose of this policy, 'documents' includes electronic, and paper records.

3.2. Where storage is by means of paper records, originals rather than photocopies should be retained where possible.

4. Standards of good practice

4.1. The council will make every effort to ensure that it meets the following standards of good practice:

- Adhere to legal requirements for the retention of information as specified in the Retention Schedule at Annex A.
- Personal information will be retained in electronic format on the Council's secure OneDrive and SharePoint systems, and access will only be granted to authorised personnel. Original paper copies of documents, that do not need to be retained, will be securely destroyed, once it has been scanned and stored electronically.
- Laptops and devices that are used to access Council email and OneDrive accounts, including council issued and personal devices (personal devices used by councillors only), will be password protected. Passwords should be changed regularly. Please see the council's Information Technology and E-mail policy for further details.
- Appropriately dispose of information that is no longer required.
- Appropriate measures will be taken to ensure that confidential and sensitive information is securely destroyed.
- Information about unidentifiable individuals is permitted to be held indefinitely for historical, statistical or research purposes eg. equalities data.

5. Breach of Policy and Standards

5.1. Any employee who knowingly or recklessly contravenes any instruction contained in, or following from, this Policy may, depending on the circumstances of the case, have disciplinary action, which could include dismissal, taken against them.

5.2. Where there is a breach of the policy, the Council may need to consider whether there is also a breach of the GDPR.

6. Roles and Responsibilities

6.1. The Clerk has responsibility for implementation of the policy under the delegation of Kippax Parish Council

6.2. The Clerk is responsible for the maintenance and operation of this policy including ad-hoc checks to ensure compliance.

7. Retention

7.1. Timeframes for retention of documents have been set using legislative requirements, guidance from the National Association of Local Councils and the Chartered Institute of Personnel and Professional Development (CIPD).

7.2. Throughout retention the conditions regarding safe storage and controlled access will remain in place.

7.3. The attached 'Appendix' shows the minimum requirements for the retention of documents as determined by the Council for the management of specific documentation types. Officers holding documents should exercise judgement as to whether they can be disposed of at the end of those periods detailed in the attached 'Appendix'

8. Disposal

8.1. Documents/data no longer required by the Council for administrative purposes must be finely shredded/disposed of through specialist waste removal contractors and deleted entirely and securely from the Council's computer system(s).

APPENDIX A

Document Retention Timescales

Document	How kept	Retention Period
Finance		
Annual Governance and Accountability Return	Electronic, paper, published on website	Electronic held indefinitely. Paper and website kept for 5 years
Final Account working papers	Electronic	6 years
Records of all accounting transactions held in the financial management system	Electronic	6 years
Purchase Orders	Electronic	6 years
Paid Invoices / receipts	Electronic	6 years
Goods received notes, advice notes and delivery notes	Electronic	4 years
Petty cash records and receipts	Electronic	6 years
Expenses claims and receipts/invoices	Electronic	6 years
Invoices raised / receipts issues	Electronic	6 years
Prime evidence that money has been banked	Electronic	6 years
Paying in and cheque book stubs	Paper	Last completed audit year
Bank and Multipay card Statements (electronic) and Instructions to banks	Electronic	Last completed audit year
Bank reconciliations and other Committee meeting reports	Electronic	Last completed audit year
Grant/Funding Applications made	Electronic	6 years
Documentation referring to externally funded projects		6 years
Grant applications received	Electronic	6 years
Asset Register for statutory accounting purposes	Electronic	10 years
Approved annual budget	Electronic & published on website	6 years (5 years on the website)
Budget Estimates – Detailed Working Papers and summaries	Electronic	3 years
Precept forms	Electronic	Indefinitely
Internal Audit Plans/Reports	Electronic	4 years
Internal audit fraud investigation	Electronic	7 years from date of final outcome of investigation
Insurance Company name and policy numbers	Electronic	Indefinite
Certificates for insurance against liability for employees	Electronic	Indefinite
Insurance policies (excluding elements above)	Electronic	As long as a claim can be made under it
VAT records, input and output and claims	Electronic	6 Years
Quotations and tenders	Electronic	6 years
Pre-tender qualification document, summary list of expression of interest received, a summary of any financial or technical evaluation supplied with the expressions of interest Initial application	Electronic	1 year

Successful tender documentation Life of contract	Electronic	6 years from date of final payment
Unsuccessful tender documentation	Electronic	Until final payment of contract let is made
Final accounts of contracts executed under hand or seal	Electronic	12 years from completion of Contract
Deeds of land and property	Electronic	Indefinitely
Land and property rental agreements	Electronic	6 years after expiry of the agreement
Lease agreements, variation and valuation queries	Electronic	12 years after the expiry of the agreement

Personnel – Employment		
Unsuccessful application forms	Electronic	1 year
Unsuccessful reference requests	Electronic	1 year
Successful application forms and CVs	Electronic	Duration of employment + 6 years
References received	Electronic	Duration of employment + 6 years
Employment contracts and subsequent amendments	Electronic	Duration of employment + 6 years
Statutory sick records, pay, calculations, certificates etc.	Electronic	Duration of employment + 6 years
Annual leave records	Electronic	Duration of employment + 6 years
Unpaid leave/special leave	Electronic	Duration of employment + 6 years
Annual appraisal/assessment records	Electronic	Current year and previous 2 years
Disclosure and Barring checks records	Electronic	Duration of employment + 6 years
Employee Personnel files, training records, discipline and grievance records	Electronic	Duration of employment + 6 years
Disciplinary or grievance investigations - unproven	Electronic	Destroy immediately after investigation or appeal
Statutory Maternity/Paternity records, calculations, certificates etc	Electronic	3 years after the tax year in which the maternity/ paternity period ended
Time sheets and overtime claims	Electronic	Last completed audit year
Statutory declarations to The Pension Regulator	Electronic	Indefinitely
Salaries/Payroll/PAYE records, overtime, bonuses	Electronic	12 years
Redundancy records	Electronic	6 years from the date of redundancy

Volunteers		
Unsuccessful application forms	Electronic	1 Year
Unsuccessful reference requests	Electronic	1 Year
Successful application forms	Electronic	Duration of volunteering + 6 years
References received	Electronic	Duration of volunteering + 6 years
Disclosure and barring check records	Electronic	Duration of volunteering + 6 years
Volunteer information files including volunteer agreements, training records, signed policies etc	Electronic	Duration of volunteering + 6 years
Work rotas	Electronic	1 month

Councillors		
Unsuccessful application forms	Electronic	When decision has been made
Successful application forms	Electronic	When decision has been made
Councillors Registers of Interests	Electronic & published on website	For duration of office
Councillors Declaration of Acceptance of Office forms	Electronic	For duration of office
Chair & Vice Chair Declaration of Acceptance of Office	Electronic	When position comes to an end
Councillors' information files including signed policies	Electronic	For duration of office
Disclosure and Barring check records	Electronic	For duration of office

Corporate		
All Council minutes including minutes of committees, sub-committee meetings and any working group minutes	Electronic, published on website. Paper signed copies	Indefinitely and paper copies archived after two years with Leeds City Council
All Council agendas	Electronic, published on website.	5 years
Agenda supporting papers	Electronic	5 years
Policies and procedures	Electronic, published on website	Previous versions should be kept for 3 years for reference
Security Incident reports	Electronic	6 years
Electoral Register	Electronic	Only up to date copy retained

Health & Safety		
Health and Safety Accident books and records	Electronic	3 years after the date of the last entry. (unless an accident involving chemicals or asbestos is contained within then 40 years). If the accident concerns a child or young adult retain until the person reaches the age of 21.
All inspection certificates	Electronic	6 years
Repairs job sheets	Electronic	2 years
Periodic machinery inspection tests (PAT, equipment calibration etc)	Electronic	2 years
Documents relating to the process of collecting, transporting and disposal of general waste	Electronic	3 years
Documents relating to the process of collecting, transporting and disposal of hazardous waste		10 years
Plant and equipment testing		2 years
Risk assessments (any)	Electronic	6 years

Activities and Events		
Community Pantry operational records, e.g. entrance records, purchasing and stock management	Electronic	6 years
Event plans, applications, stall holders, vendors, contractors and other management information	Electronic	6 years
Online competition entrants' photographs and details	Electronic	1 month after competition judged
Online competition votes	Electronic	Retained on Facebook indefinitely
KPC published magazines and newsletters	Electronic and Kippax Voice editions published on website	indefinitely

Other		
Routine correspondence	Electronic	File management – retain until matter dealt with; maximum period 6 months. Where the Council believes that it is necessary to keep correspondence for an increased length of time, it will redact personal data from the correspondence.
Requests under the Freedom of Information Act 2000 and Subject Access requests	Electronic	File management – retain until matter dealt with plus 6 months. Where the Council believes that it is necessary to keep correspondence for an increased length of time, it will redact personal data from the correspondence.
Planning Applications	Electronic	Recommendations in connection with relevant planning applications are recorded in the minutes which are retained indefinitely. Correspondence (both hard copy and electronic) received in connection with planning applications will be retained in accordance with the agenda supporting documents policy noted above.
Neighbourhood Plan	Electronic, paper and published on website	indefinitely