



Bridlington Town Council

Retention Policy

Adopted
for the Bridlington Town Council Term 2023-2027

Minute reference 27.23

To be reviewed Annually



BRIDLINGTON TOWN COUNCIL RETENTION POLICY

Introduction

1. The Town Council has created a retention policy to enable the Council to manage the retention of documentation to be in accordance with General Data Protection Regulations (GDPR) whilst also adhering to Chapter 12 of 'Local Council Administration'. This policy is to particularly help with the length of time documents should be retained by the council.

Retention of Documents

2. The list below indicates the appropriate retention periods for audit purposes and the reasons for retention.
3. If the Council is in doubt about the retention of a document then it should seek advice from the Local Councils Association and retain the document(s) until that advice has been received.
4. To ensure records are easily accessible it is necessary to comply with the following:
 - A list of files stored in cabinets will be kept – A File Index.
 - Electronic files will be saved using relevant file names and will be backed up periodically on portable USB's which will be retained in the Town Council safe.
5. Documents of historical importance, if not retained by the council, should be offered first to the county record office. The county archivist will always be willing to advise on which records should be permanently preserved.

6.

Document	Minimum Retention Period	Reason
Bank paying-in books	Last completed audit year	Audit
Bank statements, including deposit/savings accounts	Last completed audit year	Audit
Cheque book stubs	Last completed audit year	Audit
Insurance policies	While valid	Management
Investments	Indefinite	Audit, Management
Members allowances register	6 years	Tax, Statute of Limitations
Minute books & supplementary committee meeting information	Indefinite	Archive legal document
Paid cheques	6 years	Statute of Limitations
Paid invoices & VAT records	6 years	VAT
Petty cash, postage & telephone books	6 years	Tax, VAT, Statute of Limitations
Quotations and tenders	12 years/indefinite	Statute of Limitations
Receipt and payment account(s)	Indefinite	Archive
Receipt books of all kinds	6 years	VAT
Scales of fee and charges	5 years	Management

Timesheets	Last completed audit year	Audit (retained with payments)
Title deeds, leases, agreements, contracts	Indefinite	Audit, Management
Salary record/payroll	12 years	Superannuation
Planning Documents structure plans, local plans and similar documents	Retained as long as they are in force	Reference
Newsletters and Circulars	Retained as long as they are relevant	Reference
Magazines & Journals	Local Council Review 5 years others retained as long as they are relevant	Reference
Correspondence relating to audit	Last completed audit year	Audit
Correspondence relating to planning	Retained as long as they are relevant but correspondence pertaining to a planning application & available via public access is not required to be retained	Reference
Correspondence including civic	Reviewed annually for relevance for retention	Reference
Correspondence relating to Events, Competitions, Consultation & Public Engagement activities	Reviewed annually for relevance for retention	Reference
BTC Newsletters	Indefinite	Historical archive
BTC Policies	Retained as long as they are relevant	Reference
BTC Contacts on all office computers	Retained as long as they are relevant	Reference & Management

Incident/Accident Reports	20 years	Potential claims
Skatepark Inspections & Reports	21 years	Potential claims
<p>General correspondence:</p> <ul style="list-style-type: none"> • One Correspondence folder in the office in date order • Electronic correspondence is retained on machines in General public folders 	1 year or Retained as long as they are relevant	Management
Personnel and Councillor correspondence & personal details	Retained as long as they are relevant and for potential Reference, payment of Tax, National Contributions and pensions and in respect of any related legal claims made against the Council.	Management