

Document Retention Schedule

This retention schedule sets out the main types of town and parish council records and describes how long they should be retained and what should happen to them thereafter. It includes those which should be preserved and deposited with the Archives and Cornish Studies Service at Kresen Kernow, and those which should be destroyed. It supersedes the Cornwall Association of Local Councils (CALC) guidance from 2022 (version 5).

In addition to the following records Forrabury and Minster Parish council have adopted the following:

	Type of record	Keep in parish (years)	Final decision
A	Meeting recordings (if made)	Retain until written minutes are approved	Destroy
B	General emails	5 years	Destroy

The following records, in the Archive and Cornish Studies Service document retention schedule for Parish Councils, are not currently the responsibility of the Parish Council.

11, 12, 13, 14, 15, and 16 as they are currently the responsibility of the Parochial Church Council.

Schedule of Documents

	Type of record	Keep in Council custody (years)	Final decision
	Administration		
1	Minutes of council and committees (signed)	4	Preserve
2	Reports (only those not attached or duplicated within council minutes)	4	Preserve
3	Councillors' declarations of acceptance of office	Term of office + 4	Preserve
4	Correspondence and other papers on routine administration	4	Destroy
5	Papers relating to major developments not duplicated in minutes but associated with decisions (if unsure seek advice from ACSS)	4	Preserve
6	Maps of authority boundaries (if held seek advice from ACSS)	4	Preserve
7	Copies of replies to important questionnaires about major developments (if unsure seek advice from ACSS)	4	Preserve
8	Grouping Orders	Transfer to KK as soon as there is no longer an administrative requirement	Preserve
9	Byelaws and Orders	Transfer to KK as soon as there is no longer an administrative requirement	Preserve

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10	Council/Member Register of Interests	Destroy 12 months after Councillor / Member ceases role	Destroy
<i>Burial grounds (as per Authorities Cemeteries Order 1977, No. 204, Section 12):</i>			
11	Plans, registers of graves and graves purchased	4 or when complete, Council to have copy	Preserve
12	Burial registers	When complete, Council to have a copy	Preserve
13	Records of disinterments and applications for interment	4	Preserve
14	Records of memorial applications and those removed from graves	4	Preserve
15	Agreements concerning maintenance of ground, graves and memorials	4	Preserve
16	Papers for minor works (e.g. grass-cutting, repairs to property)	4	Destroy
<i>Rights of way:</i>			
17	Consultation papers, surveys	4	Preserve
18	Maps (ACSS to check for duplicates)	4	Preserve
<i>Allotments:</i>			
19	Registers of tenants, plot maps	4	Preserve
20	Rent records and registers	7	Sample to preserve
<i>Village greens, commons:</i>			
21	Registration records, consultation papers	4	Preserve

Financial records			
22	Annual audited accounts	7	Preserve
23	Ledgers (historic)	7	Preserve
24	Cash books, bills, vouchers, bank statements, other subsidiary financial records	7	Destroy
25	Insurance policies and associated risk assessments (As per National Association of Local Councils Legal Policy where it is noted that records should be kept for this duration from commencement of policy or renewal as mentioned in the Employer's Liability Compulsory Act 1969)	40	Destroy
26	Poor rate ledgers (historic)	Transfer to KK	Preserve
27	Receipt and payment books	7	Preserve

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	Legal records		
28	Deeds, statutory documents, title deeds, other documents relating to title, acquisition, purchase, disposal or rights over Council property; statutory notices, orders, plans, surveys, leases, agreements and contracts etc	Transfer to KK as soon as there is no longer an administrative requirement	Preserve
29	Charities: deeds, schemes, orders, minutes, accounts, distribution lists, benefactions	Transfer to KK as soon as there is no longer an administrative requirement	Preserve
	Publications		
30	Town/parish magazines and newsletters	4	Preserve
31	Town/parish histories, scrapbooks, photographs with captions, publicity material (<u>not</u> press cuttings)	4	Preserve (or sample if large number)
	Inherited or historic records which should be transferred to Kresen Kernow		
32	Tithe maps and apportionments	Transfer to KK	Preserve
33	WWII war/invasion books, action plans and associated papers	Transfer to KK	Preserve
34	Vestry minutes	Transfer to KK	Preserve
35	Overseers' records	Transfer to KK	Preserve
36	Any records dating from before 1945 held by the Town or Parish Council (e.g. poor law records, surveyors of highways and enclosure awards)	Transfer to KK	Preserve
37	Records from other organisations (e.g. burial boards, Rural District Councils, fire brigades, home guard, local societies, charities, trusts and other committees) National Association of Local Councils Legal Policy states that there is 'no limitation period in respect of trusts; councils are advised never to destroy trust deeds and schemes and other similar documentation.	Seek advice from ACSS (ephemera to be reviewed)	
38	Village/parish appraisals, plans and millennium projects	Seek advice from ACSS (ephemera to be reviewed)	Preserve (or sample if large number)

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Documents and information transferred to Kresen Kernow will remain available to the council and for public inspection. This schedule is produced as a guide only; retention locally will need to be assessed on a case-by-case basis.

Retention periods

- These start from the date of the last entry in the record and documents should be retained for the number of years listed as a minimum.
- The retention time for most documents is standardised to at least four years, but assessment will need to be done on a case-by-case basis, with finance documents retained for at least seven years to reflect legal and audit requirements.

Actions

- **Preserve** - these records should be transferred to Kresen Kernow for permanent preservation. They will need weeding first to remove duplicate copies or insignificant documents.
- **Review/sample** - records marked for review/sample should be reviewed and weeded prior to transfer. If you are unsure about sampling, please ask for advice from the ACSS.
- **Destroy** - records can be retained locally but would not be considered for permanent preservation as part of the collection held at Kresen Kernow. Where no minimum retention period is given, things may be destroyed when no longer required for administrative purposes. Documents should be treated as confidential waste and shredded.
- Only one copy of any document should be transferred unless any copies are significantly different.
- Clerks are often best placed to identify documents that relate to important or controversial local issues and developments.

Minutes

- Minutes should be signed if possible and in date (or reverse date) order.
- Agendas should not be kept unless they contain significant information not in the minutes or the minutes do not exist.
- Reports/significant correspondence should be kept. If there are detailed minutes, large amounts of correspondence may not need to be kept.
- Only keep annual accounts, unless these do not survive, in which case keep interim accounts.
- Make sure you know where all the minutes are – they are important records.

Digital and audio-visual records

- If any of the material on the schedule is in a digital format (other than Word, Excel, pdf, mp3 or mp4), please speak to the team at Kresen Kernow about their preservation.
- Any video or sound recordings should be weeded, sampled and digitised before transfer.

For advice and to arrange transfer's contact:

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Tel. 01872 32433

For general council advice contact:

Tel. 01872 272648