

Corfe Castle Parish Council
Records Retention Policy – Proposed 9th January 2023

Records category	Description	Scope and example document types	Action	Authority
Publications	All records relating to the creation and publication of team and service-level publications	Posters, flyers, booklets	Destroy when superseded, transfer a copy of external publications to the Dorset History Centre	Business need
Complaints Processing	All records relating to complaints dealt with as business as usual	Complaints	Destroy 3 years after date last modified <u>after complaint case closed.</u>	Business need
Correspondence and Feedback	All records relating to correspondence and feedback dealt with as business as usual	Includes correspondence on general subjects from members of the public	Destroy <u>once correspondence issue dealt with, if contains any individual identifying comments, otherwise destroy</u> 3 years after date last modified, unless Clerk believes may have historical interest then transfer to Dorset History Centre once administrative use over.	Business need
Performance Reporting	All records relating to the collection and publication of performance indicators	Performance data, benchmarking, quality assurance, statutory returns	Destroy 6 years after date last modified <u>close of corresponding year end.</u>	Business need
Financial Planning	All records relating to the creation, implementation, and monitoring of service budgets	Budget workings, budget monitoring	Destroy 6 years after date last modified, <u>close of corresponding year end.</u>	Business need

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Tender Processing	All records relating to pre-tender planning, evaluation, negotiation, and notification for successful tenders	Tenders and quotations	If unsuccessful, destroy 1 year after contract award. If successful, destroy 12 years after last action on the contract, where the contract is under seal, or 6 years after last action on the contract, where the contract is under signature	Limitation Act 1980
Contract Management	All records relating to the management of contracts for goods and services	Contract documentation	Destroy 12 years after last action on the contract, where the contract is under seal, or 6 years after last action on the contract, where the contract is under signature	Limitation Act 1980
Risk Assessments	All records relating to service delivery risk assessments	Risk assessment	Destroy 6 years after superseded	Limitation Act 1980
Reports	All records relating to the submission of reports and responses to Full Council / Cabinet, or committees and working groups	Reports	Destroy 6 years after date last modified	Business need
Corporate Meetings	Cross-functional meeting and working group minutes and papers	Minutes, reports	Keep permanently, transfer to Dorset History Centre once administrative use over	Business need
Team Meetings	Team meeting / management team meeting minutes and papers held by individual teams	Notes, action logs	Review 6 years after date last modified, consider transferring significant subjects to Dorset History Centre	Business need

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Business Planning	All records relating to creation, implementation, and monitoring of strategic plans for teams and services	Corporate business plan, service plans	Destroy 6 years after date last modified, consider transferring significant subjects to Dorset History Centre	Business need
Policies and Procedures	All records relating to the creation, implementation and monitoring of service and team policies, procedures, and guidance	Policies, procedures, guidance	Destroy 3 years after superseded, consider transferring significant subjects to Dorset History Centre	Business need

Records category	Description	Scope and example document types	Action	Authority
Minor Projects	All records relating to the management of minor projects where there is a small (or no) budget involved	Standard project documents including project governance, research, comms, meeting documents, reports	Destroy 6 years after last action on the project	Business need
Major Projects	All records relating to the management of major projects funded through internal or external funds	Standard project documents including project governance, research, comms, meeting documents, reports	Destroy 6 years after last action on the project, transfer significant projects to Dorset History Centre. Note: Retention of externally funded programmes may be defined by the funding programme	Business need
Training Delivery	All materials created for training courses	Training notes, presentations, handouts	Destroy 3 years after superseded	Business need