



## DEPOSIT OF PARISH COUNCIL AND TOWN COUNCIL RECORDS AT THE SOMERSET HERITAGE CENTRE

### 1. Introduction

Parish and town councils create a range of records during the course of their activity. These include minutes, accounts, correspondence and legal documents. Once these records are no longer needed for the active administration of the council they can be deposited as a long term loan at the Somerset Heritage Centre (SHC). This document provides guidance on which records are eligible for deposit and how to transfer the records.

### 2. Retention Guidelines for Parish Council Records

The schedule accompanying these guidelines lists the main types of parish/town council records and provides recommendations for their transfer or disposal (see Appendix A).

The following notes provide an explanation of the terms used in the schedule and provide additional guidance to clerks on how to assess the records in their care.

#### 2.1 Records to be preserved **permanently** at the Somerset Heritage Centre (P)

- Records in this category should be deposited at the Somerset Heritage Centre when they are no longer consulted by the parish/town council on a regular basis and are no longer required for legal or statutory purposes.
- The most important records required for archival preservation are:
  - Signed parish council minutes (including committee minutes) and parish meeting minutes.
  - Receipt and payment books (over 6 years old).
- Where detailed minutes survive there should be less need to preserve large amounts of correspondence.
- Duplicate documents should be disposed of.
- Other records may be less easy to select for permanent preservation, in particular, correspondence files on important local issues and planning applications and papers for major or controversial developments. Here, individual clerks should be best placed to judge which documents relate to significant or contentious local issues about which more detailed information needs to be preserved (though it may be necessary for

further appraisal of such records to be undertaken by the Somerset Archive and Local Studies Service). A filing system arranged by subject can considerably simplify the process of selecting material relating to important issues.

## 2.2 Records to be **reviewed** by the Somerset Archives and Local Studies Service for possible permanent preservation (**R**)

- Records in this category should be passed to the Somerset Heritage Centre for review when they are no longer required for administrative, legal or statutory purposes. Records that are found not to have archival value will be returned to the parish/town council or disposed of confidentially (following consultation with the parish clerk).

## 2.3 Records that may be **destroyed** by the parish or town clerk (**D**)

- Records in this category may be disposed of by the parish or town clerk when they are no longer required for administrative, legal or statutory purposes.
- Duplicate documents found in categories marked for **P** or **R** (for example: copies of minutes) can also be disposed of.

## **3. How to deposit the records at the Somerset Heritage Centre**

- Please phone us on 01823 278805 before your intended visit so that we know when to expect you and have a rough idea of the quantity of the records. Details of our opening times can be found under the relevant section of the South West Heritage Trust website ([www.swheritage.org.uk](http://www.swheritage.org.uk)).
- We will issue you with a receipt at the time of deposit. This will record:
  - The date the documents were deposited and the name of the Parish Council.
  - The contact details of the person to whom the receipt and catalogue will be sent (usually the Parish Clerk).
  - A brief summary of the documents deposited and covering dates.
  - Terms of deposit. The majority of Parish Council records are deposited as a **loan** (i.e. the Parish Council maintains overall ownership of the records). A charge may apply if the records are withdrawn on a permanent basis in order to cover any administration costs in processing and caring for the records.
- As soon as we have accessioned the records a formal receipt will be posted to you providing the reference code and accession number that we have allocated to them.
- When we have listed the records a copy of the catalogue will be sent to you. Please note that if the collection comprises more than 2 boxes of documents it may be some time until the records are catalogued.

**Date of guidance:** April 2018

## Appendix A Schedule of Records

Records	Recommended Action	
<b><u>Administration</u></b>		
Minutes of Council/meeting (signed series)	P	Transfer to SHC as soon as there is no longer an administrative requirement
Reports and other documents circulated with agendas	R (but D if copies are included with signed minutes)	
Agendas	D (but P if minutes do not survive*)	Dispose of when no longer required for administrative, legal or statutory purposes (*or transfer to the SHC as soon as there is no longer an administrative requirement)
Councillors' declarations of office	P	Transfer to SHC as soon as there is no longer an administrative requirement
Register of Interests	R	
Grouping orders	P	
Nominations forms parish council elections	D	Dispose of when no longer required for administrative, legal or statutory purposes
Byelaws and orders	P (one copy of each)	Transfer to SHC as soon as there is no longer an administrative requirement
Policy documents	R	
Title deeds	P	Transfer to SHC as soon as there is no longer an administrative requirement

Property registers and terriers including registers of allotments	P	Transfer to SHC as soon as there is no longer an administrative requirement
Maps, plans and surveys of property owned by the council or meeting	P	
Correspondence and associated papers relating to important or controversial local issues or activities (eg. flooding, proposed bypass, etc.)	R	
Village/parish appraisals, plans and millennium projects	R (with the view to P)	
Planning applications (with associated papers) relating to major and controversial developments	R (with the view to D)	
Planning applications for non-controversial developments or where permission is refused	D	Dispose of when no longer required for administrative, legal or statutory purposes
Leases, agreements, contracts and wayleaves	R	Transfer to SHC as soon as there is no longer an administrative requirement
Quotations and tenders (successful)	D	Dispose of when no longer required for administrative, legal or statutory purposes
Quotations and tenders (unsuccessful)	D	Dispose of when no longer required for administrative, legal or statutory purposes
Routine correspondence and papers	D (R if no minutes held for the period in question*)	Dispose of when no longer required for administrative, legal or statutory purposes (*or transfer to SHC as soon as there is no longer an administrative requirement)
Scale of fees and charges	D	Dispose of when no longer required for administrative, legal or statutory purposes

Insurance policies and Risk assessments	D	Dispose of when no longer required for administrative, legal or statutory purposes
Playground assessments	D	
Licensing papers	D	
Tree preservation orders	D	
Electoral registers	D	
Somerset Association of Local Councils papers	D	
Loan sanctions	D	
Staff files	D	
<b><u>Finance</u></b>		
Receipt and payment books	P	Transfer to SHC as soon as there is no longer an administrative requirement (usually 6 years plus the current year)
Financial returns to district auditors	D (but P if the receipt and payment books have not survived*)	Dispose of when no longer required for administrative, legal or statutory purposes (*or transfer to SHC as soon as there is no longer an administrative requirement) (usually 6 years plus the current year)
Cash and petty cash books and rent books	D (R if the receipt and payment books have not survived*)	
Receipt books of all kinds	D	Dispose of when no longer required for administrative, legal or statutory purposes (usually 6 years plus the current year)
Postage and telephone books	D	

Bank statements including deposit/saving accounts	D	Dispose of when no longer required for administrative, legal or statutory purposes (usually 6 years plus the current year)
Bank paying-in books	D	
Cheque book stubs	D	
Paid invoices	D	
Paid cheques	D	
VAT records	D	
Time sheets	D	
Members' allowances register	D	
Records relating to parish halls, centres and recreation grounds: applications to hire, letting diaries, copies of bills to hirers and records of tickets issued	D	
Precept books and contribution orders	D	
Wages books	D	Dispose of when no longer required for administrative, legal or statutory purposes
<b><u>Miscellaneous</u></b>		
Maps created under the provision of the Rights of Way Act 1932	P	Transfer to SHC as soon as there is no longer an administrative requirement
Community magazines newsletter	R (one copy of each issue)	
Press cuttings book	R	Transfer to SHC as soon as there is no longer an administrative requirement
Photographs [annotated with date and event/place where possible]	R	

Any records dating from before 1894 now held by the town or parish council (eg. poor law, surveyors of the highway, enclosure awards etc.)	P	Transfer to SHC as soon as there is no longer an administrative requirement
Any pre-1945 parish/town council records	R	
Records of other bodies such as burial boards, charities, fire brigades, home guard, local societies, commons, or ad hoc committees	P (but R ephemeral items, with view to D)	
Burial ground records listed in Local Authorities Cemetery Order 1977 No 204 Section 12:  Registers, plans, record of disinterment, record of memorials/tombstones that have been removed, destroyed, etc.	P	Transfer to SHC as soon as there is no longer an administrative requirement
Burial ground records listed in Local Authorities Cemetery Order 1977 No 204 Section 12:  Cremation and burial certificates	(D)	Dispose of when no longer required for administrative, legal or statutory purposes
Burial ground records listed in Local Authorities Cemetery Order 1977 No 204 Section 12:  Other records	R (with view to D)	Transfer to SHC as soon as there is no longer an administrative requirement
General reports, guides, handbooks etc., received by the parish council from other Somerset bodies	D	Replace with new guides as issued