

Drayton Parslow Parish Council Data Retention Policy

Policy Title: Data Retention Policy	Protocol Date First Adopted by Council:
Policy Version: 01	Date Policy Adopted: 27/02/2023
Review Period: Every 3 Years	Next Review: February 2026
Disposal Date [Period]: Not applicable	

Document History

Version	Description of Changes	Date Adopted	Minute Reference
01			

Introduction

The Council accumulates a vast amount of information and data during the course of its everyday activities. This includes data generated internally, in addition to information obtained from individuals and external organisations. This information is recorded in various different types of document with the Clerk, as Proper Officer, responsible for retaining records of the Council's activities.

Roles and Responsibilities for Document Retention and Disposal

1. This policy sets out how long information will normally be held by us and when that information will be confidentially destroyed.
2. The Council delegates authority to the Clerk for implementing and monitoring compliance with this policy.
3. The Clerk shall undertake a review of documentation at least annually to ensure that any unnecessary documentation being held is disposed of in accordance with this policy. At such time the Clerk shall remind Councillors of the retention/disposal schedule.
4. Timely disposal of data should be undertaken to ensure compliance with the General Data Protection Regulation (GDPR).
5. Except under exceptional circumstances (for example a nominated Councillor responding to a complaint against the Clerk), Councillors are instructed to copy in the Clerk on all council-related email exchanges. Whilst ensuring transparency and accountability in the council's operating procedures this will also enable the Clerk to respond efficiently to third party requests for information.
6. Information (hard copy and electronic) will be retained for at least the period specified in our Records Schedule.
7. Electronically-held documents and information must be deleted at the end of the retention period.
8. Hard copy documents and information must be disposed of by secure methods such as shredding or placing in confidential waste bins.
9. There are some records that do not need to be kept at all or that should be routinely destroyed in the course of business. This usually applies to information that is duplicated, unimportant or only of a short-term value. Unimportant records of information include:
 - 'With compliments' slips.
 - Catalogues and trade journals.
 - Non-acceptance of invitations.
 - Trivial electronic mail messages that are not related to Council business.

- Requests for information such as maps, plans or advertising material.
- Out of date distribution lists.
- Duplicated and superseded material such as stationery, manuals, drafts, forms, address books and reference copies of annual reports

10. All information must be reviewed before destruction to determine whether there are special factors that mean destruction should be delayed, such as potential litigation, disciplinary action, complaints or grievances.

Document Retention Protocol

The retention schedules below provide guidance on the recommended minimum retention periods for specific classes of documents and records.

Record	Minimum retention period
Signed Minutes of Council Meetings	Indefinite (sent to County Archives)
Reports and other documents circulated with agendas not attached to signed minutes	As long as deemed necessary for the purpose for which it is held.
Agendas	Indefinite (sent to County Archives)
Councillors' Declarations office	Term of Office plus 1 year
Correspondence and papers on important local issues or activities	As long as deemed necessary for the purpose for which it is held.
Quotations and tenders for major works	6 years
Quotations and tenders for minor works	6 years
Correspondence relating to planning matters	Until development is complete or until period for appeal has expired.
General correspondence on Council business in Councillor email accounts	6 months Where destruction of information is delayed in accordance with clause 10 above, it should not be amended or disposed of by Councillors or staff until the issue is formally resolved.
General correspondence on Council business in the Clerk's email account	6 years Where destruction of information is delayed in accordance with clause 10 above, it should not be amended or disposed of by Councillors or staff until the issue is formally resolved.
Personnel and PAYE records	6 years after ceasing employment
Health and Safety records	3 years
Planning applications and related papers	Until development is complete or until period for appeal has expired.
Employers liability Insurance Certificate	Retain certificate indefinitely
Insurance policies and correspondence claims	3 years after lapse
Financial Reports and Accounts	10 years (sent to County Archives)
Bank statements	6 years
Paid invoices	6 years
VAT records	6 years or 20 years for VAT on rents
Reports, guides, handbooks and other general materials received from third parties	As long as useful