

Parish records retention policy

1. Introduction and Scope

1.1 Purpose The purpose of this policy is to ensure that Hullavington Parish Council retains records for only as long as they are required for administrative, legal, regulatory, fiscal, or historical purposes, and that all records are disposed of securely and consistently.

1.2 Scope This policy applies to **all records** created, received, or maintained by the Parish Council, regardless of format (paper, electronic files, emails, backups, or social media content).

1.3 Key Principles (Data Protection Act 2018/GDPR) The Council must ensure that personal data is:

- **Retained for no longer than is necessary** for the purposes for which it is processed.
- **Securely destroyed** once the retention period has been reached and the administrative need has ceased.

2. Retention Schedule

The following schedule sets out the **minimum retention period** for key Council records. The retention period is the time the document **must be kept**. Once this period expires, the document should be reviewed for disposal.

| Document / Record Series | Minimum Retention Period | Reason / Authority | Final Action |
|---|-------------------------------|---------------------------------|---------------------------|
| I. GOVERNANCE & ARCHIVE | | | |
| Signed Minutes of Council/Committee Meetings | Indefinite (Permanent) | Statutory Requirement / Archive | Transfer to Local Archive |
| Agendas and Supporting Reports | 5 years | Management / Public Access | Destroy/Delete |

| Document / Record Series | Minimum Retention Period | Reason / Authority | Final Action |
|---|----------------------------------|-----------------------------------|---------------------------|
| Title Deeds / Leases / Agreements of Council Land/Property | Indefinite (Permanent) | Legal / Audit / Asset Management | Transfer to Local Archive |
| Byelaws and Orders | Indefinite (Permanent) | Legal Record | Transfer to Local Archive |
| Annual Reports / Strategic Plans | Indefinite (Permanent) | Historical Value / Archive | Transfer to Local Archive |
| II. FINANCE & AUDIT | | | |
| Annual Governance and Accountability Return (AGAR) | Indefinite (Permanent) | Legal Record / Public Inspection | Transfer to Local Archive |
| Accounting Records (Invoices, Receipts, Paid Cheques) | 6 years + current year | VAT / Audit / Limitation Act 1980 | Secure Shredding/Deletion |
| Bank Statements and Reconciliation Statements | 6 years + current year | Audit / Management | Secure Shredding/Deletion |
| Asset Register | Indefinite (Permanent) | Audit / Asset Management | Retain (Update only) |
| Scales of Fees and Charges | 6 years | Management / Audit | Destroy/Delete |
| Quotation and Tenders (Successful) | 6 years from contract completion | Limitation Act 1980 (Contract) | Secure Shredding/Deletion |
| III. EMPLOYMENT & HR | | | |
| Employee Personnel Files (Clerk/RFO) | 6 years after ceasing employment | Management / HMRC / Statutory | Secure Shredding/Deletion |
| Employee Payroll Records (Tax/NI) | 12 years | HMRC / Superannuation | Secure Shredding/Deletion |

| Document / Record Series | Minimum Retention Period | Reason / Authority | Final Action |
|--|---------------------------------|--|---------------------------|
| Unsuccessful Job Application Forms | 6 months | Legal (Equalities Act) | Secure Shredding/Deletion |
| Employer's Liability Insurance Certificates | 40 years from policy date | The Employer's Liability (Compulsory Insurance) Regulations 1998 | Secure Shredding/Deletion |

IV. HEALTH & SAFETY / LEGAL

| | | | |
|---|----------------------------|--|---------------------------|
| Accident/Incident Books and Reports | 20 years | Potential claims / Limitation Act 1980 | Secure Shredding/Deletion |
| Playground/Street Furniture Inspection Reports | 21 years | Potential claims (Minors) | Secure Shredding/Deletion |
| General Risk Assessments | Until superseded + 3 years | Management / Potential claims | Destroy/Delete |

V. COUNCIL MEMBERS

| | | | |
|--|--------------------------|--------------------------------|------------------------------|
| Councillor Declarations of Acceptance of Office | Term of Office + 1 year | Management | Destroy/Delete |
| Register of Members' Interests | Term of Office + 6 years | Management / Public Inspection | Destroy/Delete |
| Councillor Contact Details | Duration of Membership | Management | Secure Deletion on departure |

VI. ALLOTMENTS

| | | | |
|-------------------------------------|-------------------------------|--------------------------------|---------------------------|
| Allotment Tenancy Agreements | 6 years after end of tenancy | Limitation Act 1980 (Contract) | Secure Shredding/Deletion |
| Allotment Register and Plans | Indefinite (Permanent) | Management / Asset Record | Retain (Update only) |

| Document / Record Series | Minimum Retention Period | Reason / Authority | Final Action |
|--|--|---------------------------------------|---------------------------|
| VII. GENERAL CORRESPONDENCE | | | |
| Routine Emails/Correspondence (non-business critical) | Review after 1 year | Data Protection Principle (Necessity) | Secure Deletion |
| Correspondence relating to a specific policy/asset | Follow the retention period for that Policy/Asset. | Management | Secure Shredding/Deletion |

3. Disposal Procedure

3.1 Trigger for Disposal The Clerk is responsible for monitoring the retention schedule. Records should be destroyed when their minimum retention period has expired, and there is no outstanding administrative, legal, or audit requirement to keep them (e.g., no pending FOI request or litigation).

3.2 Secure Destruction

- **Confidential Paper Records** (containing personal or sensitive information, e.g., payroll, unsuccessful applications) **must be shredded** using a cross-cut shredder and disposed of as confidential waste.
- **Electronic Records** (files, emails, cloud data) **must be permanently deleted** from all storage locations, including backups and cloud trash folders, to ensure they are non-recoverable.

3.3 Disposal Log The Clerk must maintain a **Disposal Log** (Record of Destruction) for all records containing personal or confidential data that are destroyed. This log should record:

- The category of record (e.g., Unsuccessful Job Applications, Bank Statements).
- The date range of the records destroyed.
- The date of destruction.
- The method of destruction (e.g., cross-shredded, permanently deleted).

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Approving committee: Ordinary Council Meeting

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