

Easton Parish Council

Data Retention Policy

Introduction

The Parish Council recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the Parish Council.

This document provides the policy framework through which this effective management can be achieved and audited.

This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Parish Council and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Responsibilities

The Parish Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. The person with overall responsibility for the implementation of this policy is the Clerk to the Parish Council, and they are required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

This is also referred to as the Data Controller in GDPR regulations introduced in May 2018.

This will be overseen by a Data Protection Officer ('DPO')

Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the record series which it creates in the course of its business. The retention schedule lays down the length of time which the record

needs to be retained and the action which should be taken when it is of no further administrative use.

The Clerk is expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when creating new record keeping systems. This retention schedule refers to record series regardless of the media in which they are stored.

Disposal Procedures

All documents that are no longer required for administrative reasons will be safely disposed of.

- Hard Copies (Paper copies): Will be shredded and recycled.
- Digital copies: To be deleted from the hard drive on the Parish Council Computer and removed from any backup devices.

| 1. General Management | | |
|---|---|---|
| Document | Retention Period | Location retained |
| Council minutes | Indefinite | Paper records placed in Huntingdon Archives after 5 years. Electronic records at Clerk's office and council website. |
| Council Agendas | 5 years | records at Clerk's office |
| Council draft minutes | Only until minutes are signed/agreed. | records at Clerk's office |
| Minor planning applications | Not retained | records at Clerk's office |
| Major planning applications with council comment | 5 years | records at Clerk's office |
| Councilors' acceptance of office | 1 year | records at Clerk's office |
| Councilors' declarations of office | 4 years or until left office | records at Clerk's office |
| Correspondence and papers on important local issues | Indefinite | records at Clerk's office |
| Routine correspondence | 1 year | records at Clerk's office |
| Internal council email | 5 years unless relates to another category then it is retained for the designated time. | Email server and councilors personal computers |
| External council email | 5 years unless relates to another category then it | Email server and councilors personal computers |

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| | is retained for the designated time. | |
| Applications for positions | 6 years after position finishes | records at Clerk's office |
| General records considered to be of historical interest | Indefinite | records at Clerk's office and paper records placed in Huntingdon Archives after 5 years. |

2. Financial

| Document | Retention Period | Location retained |
|--|--------------------------------|---------------------------|
| Bank statements | Until the completed audit year | records at Clerk's office |
| Cheque book stubs | Until the completed audit year | records at Clerk's office |
| Paid invoices | 6 years | records at Clerk's office |
| VAT records | 6 years | records at Clerk's office |
| Receipt and payment account(s) | 6 years | records at Clerk's office |
| Supporting documentation for VAT returns | 6 years | Records at Clerk's office |
| Contracts and agreements | 6 years | Records at Clerk's office |

3. Insurance and contracts

| Document | Retention Period | Location retained |
|-----------------------------|------------------------------|---------------------------|
| Asset register | indefinite | Records at clerk's office |
| Insurance documents | 10 years after end of policy | Records at clerk's office |
| Accident reports and claims | 3 years after settlement | Records at clerk's office |

4. Miscellaneous

| Document | Retention Period | Location retained |
|--------------------|------------------|-------------------------------|
| Parish Newsletters | Indefinite | Electronic records on website |