

Ewshot Parish Council

Data Retention Policy

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 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 the overall responsibility for the implementation of this policy is the Clerk to the Parish Council, and the Clerk is 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.

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 ensuring full compliance with the Data Protection Act 2018, which came into force on 25 May 2018 which gives effect to UK law to the UK General Data Protection Regulations (UK GDPR).

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.

DOCUMENTS	MINIMUM RETENTION	REASON
Minute Book	Indefinite	Archive
Meeting documents	Until there is no administrative requirement	Operational/ Common Practice
Agendas	5 years	Admin purposes
Annual Parish Meeting	Indefinite	Archive
Councillor documents e.g. Declarations of Acceptance of Office, Code of Conduct, DPIs	1 year after vacating office	Operational
Annual Accounts	Indefinite	Archive/ Audit
Annual Return	Indefinite	Archive/ Audit
Bank Statements	Last completed audit	Audit/management
Cheque Book Stubs	Last completed audit	Management
Paying in Books	Last completed audit	Management
Investments	Indefinite	Audit/ Management
Quotations	6 years	Audit
VAT Records	6 years	Audit/VAT
Paid invoices	6 years	Audit/VAT
Salary Records	12 years	Audit
Tax & NI Records	12 years	Audit
Insurance policies	6 years	Audit
Certificate of Employers Liability	Indefinite	Audit/legal
Certificate of Public Liability	Indefinite	Audit/legal
Assets register	Indefinite	Audit
Deeds and leases	Indefinite	Audit
Correspondence - general	Until there is no administrative requirement	Operational
Complaints, FOIs, SARs	6 years after resolution	Operational
Maps or historical documents	Indefinitely	Archive/ Historical

Adopted: 12/01/2026