



# Stratfield Mortimer Parish Council

## Record Retention Policy

### Purpose

- 1 This is the Record Retention Policy of Stratfield Mortimer Parish Council and adopts the definitions in the Council's Policy Guidance and Glossary.
- 2 In this Policy, "Data Legislation" means the Data Protection Act 2018, the Data Use and Access Act 2025, the UK General Data Protection Regulation, and the Privacy and Electronic Communications Regulations.
- 3 The Council requires a wide variety of records for transacting its business and is committed to retaining such records in a format, and for such periods of time, that enable it to (at least) meet its statutory obligations in respect of records.
- 4 In addition, this Policy seeks to:
  - ensure the security of records;
  - protect personal details and confidential data;
  - facilitate legitimate access to information;
  - optimise the use of storage space;
  - manage the associated costs of record retention; and
  - facilitate the destruction of redundant records.
- 5 The Appendix sets out the minimum retention periods for different records.

### Scope

- 6 This Policy applies to the Council's records - physical and electronic.
- 7 This Policy, and the retention of records, is subject to the overarching requirements of the Data Legislation (eg in relation to the right for individuals to have certain personal data erased).
- 8 Electronic records will be subject to the same rules of retention and security as physical records unless otherwise stated.
- 9 Copies of Council records held by Members are not subject to a minimum retention period, but must be destroyed in accordance with the Disposal Part below:
  - where required by the Data Legislation;
  - when no longer required; or
  - at the end of the Member's term of office.
- 10 The Clerk is responsible for the implementation of the Policy.

- 11 Records subject to a statutory period of retention are identified by their associated legislation in the Appendix.

## Storage

- 12 Records that are required to be retained in a physical format (contracts, leases, deeds, etc) shall be copied to an electronic format before being stored in accordance with the Appendix.
- 13 Other physical records may be copied to an electronic format and then destroyed if that is the most convenient way of storing them.

## Security

- 14 Physical records containing personal and/or sensitive information will be kept in lockable storage.
- 15 Electronic records shall be stored on media which is password protected. The rules relating to passwords set out in the System Security Part of the Council's Financial Regulations shall be applicable to passwords relating to electronic records held in accordance with this Policy.

## Disposal

- 16 Redundant records may be destroyed in order to reduce the cost of storage, indexing and handling.
- 17 Physical records containing personal and/or confidential information will be cross shredded and disposed of as confidential waste.
- 18 Other physical records will be shredded or recycled as appropriate.
- 19 Electronic records containing personal and confidential information will be securely deleted.
- 20 Prior to disposing of computer hardware, memories and data storage will be fully wiped.

## Appendix

Category	Record	Minimum Retention Period	Processing Purpose
<b>ADMINISTRATION</b>	Annual Parish Award	Three years	Management
	Applications to Council	Six months from date of application	Management
	Complaints: No resulting policy change Resulting in a policy change	Three years from last action Five years from last action	Legal obligation
	Consultation Results	Five years from exercise	Consent
	Correspondence & emails - general	Until no longer required	Management
	Correspondence & emails - other	At least six years, then until no longer required	Limitation Act 1980 / Management
	Councillor email accounts	One year following end of term of office	Management
	Historical Information	Indefinite	Historical purposes
	Information from other bodies	Until no longer required	Management
	Newsletters	Indefinite	Interest
	Parish Plans/NDP – final copy	Indefinite	Management & historical purposes
	Planning documents	Until no longer required	Information is held by Planning Authority
	Policies/Procedures	Until revised copy is available	Management & Audit
	Register of Electors	Until no longer required	Management
	Risk Assessments	Until reviewed and updated	Management
	Speed Watch Data	As soon as uploaded to the Community SpeedWatch portal	Management
<b>AUDIT AND FINANCE</b>	Asset Register	Indefinite	Management & Audit

	Bank Paying-in Book	Last completed audit year	Audit
	Bank Statements	Last completed audit year	Audit
	Cheque Book Stubbs	Last completed audit year	Audit
	Hire Forms	Six years	Audit/VAT
	Internal/External Audit Report and Returns	Indefinite	Legal
	Lettings diaries	Six years	Audit/VAT
	Paid invoices	Six years from when the relevant accounts are submitted.	Audit/VAT
	Receipt and Payment Accounts	Indefinite	
	Scale of fees/charges	Six years from when the relevant accounts are submitted.	Audit/VAT
	VAT Records	Six years from when the relevant accounts are submitted, but 20 years for VAT on rents	Audit/VAT
<b>BURIAL GROUNDS</b>	Register of: Burials Purchased Graves Register/plan of grave spaces Memorials Applications for internment Applications for right to erect memorials Disposal certificates Copy certificates of grant of exclusive right of burial	Indefinite	Archives, Local Authorities Cemeteries Order 1977
<b>COMMITTEES</b>	Agendas	Once finished with	Management – no current obligation
	Meeting Papers	Once finished with Six years/until no longer needed	Management

	Meeting Recordings	Until minutes have been approved	No current obligation
	Minutes - approved	Indefinite Six years	Statutory No current obligation
	Minutes - draft	Until minutes have been approved	Management
<b>PERSONNEL</b>	Recruitment records for unsuccessful candidates	Six months after candidate has been notified	Equality Act 2010
	Staff employment records	Duration of Employment plus seven years	Contract
	Staff leave and absence	Two years after action completed	Contract and management
	Staff pension records	Six years from date of last pension payment	Legal/Audit
	Staff payroll records	Six years from when the relevant accounts are submitted	Tax/Audit
	Time sheets	Three years	Audit Personal Injury Limitation Act 1980
<b>PURCHASE MANAGEMENT</b>	Contracts	Six years after contract expired 12 years for contracts under seal	Limitation Act 1980
	Quotations and tenders	Successful: six years after contract expired Unsuccessful: one year	Limitation Act 1980 / Management
<b>STATUTORY and LEGAL</b>	Accident/Incident Report	21 years	Management
	CCTV	30 days unless retained in accordance with CCTV Policy (eg relating to investigation)	Data Protection Act 2018
	Certificate of Employers Liability	40 years from date on which insurance commenced or was renewed	Employers' Liability (Compulsory Insurance) Regulations 1998
	Declaration of Term of Office	Six years	Legal – Members are required to sign

	Deeds	Indefinite	Audit and management
	Freedom of Information Requests	Three years	Legal
	Insurance policies but see below	Seven years after the term of the policy has expired	Legal
	Insurance policy numbers and company names	Indefinite	Management
	Insurance claim	Seven years after all obligations/entitlements are concluded (allowing for the claimant to reach 25 years of age)	Legal
	Leases	12 years	Limitation Act 1980
	Risk Assessments	Whilst valid	Insurance
	Register of Members Interest	Six years	Legal
	Playground equipment inspection reports	Duration of life of equipment plus six years	Limitation Act 1980

## Document control

[illegible]