**Westwell Parish Council Data Retention Policy**

**Introduction**

 Westwell 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 and the General Data Protection Regulations 2018, 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 regardless of the media in which they are stored.

**Retention of Documents**

 The table below shows the documents / data the Parish Council is likely to hold, and the retention periods relating to each type of data, with a reason provided for each of the retention periods used. The retention periods are often stipulated or governed by statute or other provisions. Further information can be found in the references identified in this policy.

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| **Document** | **Minimum Retention Period** | **Reason** |
| Minute Book | Indefinite | Archive |
| Annual Accounts | Indefinite | Archive |
| Annual Return | Indefinite | Archive |
| Receipt and Payment Accounts | Indefinite | Archive |
| Certificate of Employer’s Liability | Indefinite | Audit / Legal |
| Certificate of Public Liability | Indefinite | Audit / Legal |
| Asset Register | Indefinite (kept up to date) | Audit |
| Deeds | Indefinite | Audit / Management |
| Salary Records | 12 years | Superannuation |
| Agenda Papers | 6 years | Management |
| Cheque Book stubs (as a proxy for paid cheques) | 6 years | Limitation Act 1980 (as amended) |
| Quotations and tenders | 6 years | Limitation Act 1980 (as amended) |
| Paid Invoices | 6 years | Limitation Act 1980 (as amended) |
| VAT records | 6 years  | VAT |
| Tax and National Insurance | 6 years | Audit / Management / HMRC |
| Insurance Policies | 6 years | Audit / Management / Legal |
| Bank Statements | Last completed audit | Audit / Management |
| Paying in Books | Last completed audit | Audit / Management |
| Members’ records, including declarations of interest | While Valid | Management |
| Employees’ records | While Valid | Management |
| Electors’ records (register, other schedules) | While Valid | Management |
| Correspondence not otherwise covered in this schedule | While Valid | Audit / Management / Other |

Adopted May 2021

Next review May 2024